A STUDY OF THE TRAINING IMPLICATIONS OF DEVELOPMENTS IN THE WORK OF A SAMPLE OF TRAINING OFFICERS IN THE UK

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Abstract

Summary

This paper outlines the findings of a research project which dissertation examines changes in the roles and relationships of a sample of T.O's over a three year period to determine the training implications of developments in their jobs, in the light of earlier research studies. The FINAL sample comprised ~~103~~ 79 ex-course members of the Middlesex Polytechnic Training of Training Officers (introductory) course who attended the course between 1973 and 1976: the response rate was ~~73.4%~~ 73.4% (58 respondents), comprising 78% full-time and 22% part-time T.O's from 13 industries and firm sizes ranging from 100+ to 2000+ employees.

No consistent pattern of role development emerged over the three year period but certain trends were discernible. There was an increase in the use of the counselling role illustrating a trend, noted in this and other studies, towards an enhanced realisation of the importance of personal relationships in training activities and the need to develop counselling and coaching roles during T.O. training. The key role of 'identifying training needs' increased in use but the basic roles of 'evaluation', 'job training analysis' and 'structuring training objectives' did not extend significantly over the three year period. The relatively low levels of support for these central roles, and the wide variations which appeared in the activities undertaken within these roles, in this and other researches, strongly points the requirement for further research into our assumptions about these role areas. The findings from this study suggest that the problem is partly one of semantics stemming from idealised role expectations.

Using the results of this and other researches, it would appear feasible to postulate a broad set of common roles and activities necessary for most entrants into the training function: the survey lists 16 roles which largely coincide with those hypothesised by the Manpower Services Commission (1978). Perceptions of difficult, time-consuming and key areas generally coincided with those roles respondents accepted as necessary for the effective use of the training function.

The finding that an introductory course appeared to meet most of the training needs of respondents over the three year period is a matter of concern and suggests either severely limited expectations from both respondents and their managers or possibly the existence of a gap between the professional expectations of those concerned with the training of T.O's and the actual needs of practitioners.

SECTION 1

INTRODUCTION

TO Roles: the recent debate

Training is a multi-million pound activity in the economy of the UK. There are no precise figures available on the actual level of financial resources going into, or invested in, training but some indication of the amounts involved may be envisaged by the fact that the 23 Training Boards, which only cover about 55% of employment in Britain, are currently handling over £200m of industry's and government expenditure. The current economic downturn has led to an increasing demand from both industry and government agencies for an account from trainers on their financial stewardship. Employers' organisations have long been sensitive to, what they consider to be, the payment of a 'training tax' and government agencies, while still pursuing a policy of "improving the planning of training" and "identifying key training needs" (MSC (1980)), are becoming less willing to subsidise, what they see as, industry's responsibility for its own training.

The early part of the past decade has witnessed attempts at the use of training policies as a weapon in the fight against nation-wide skill shortages. The results have not always been favourable: skill shortages have persisted, even in times of economic downturn (Mukherjee (1974)). These shortages have been due, at least in part, to non-training factors such as the difficulty of making accurate assessments of future skill requirements using limited statistical information (MSC (1980)) but also from an inability to design and apply accelerated training schemes, develop flexible modes of training and define cross-sectoral and local training needs.

The MSC (1980) have also pointed a need for the development and application of training policies for the unemployed, particularly teenagers: the Unified Vocational Preparation scheme (MSC (1975)) for the less qualified young worker has failed to meet its potential due to a lack of experience of vocational preparation at local levels and an apparent inability on the part of trainers to evaluate outcomes. Training policy makers and trainers can, with knowledge of hindsight, begin to acknowledge the difficulties inherent in the use of national training policies, based on limited manpower and training data, to treat economic and social problems not necessarily amenable to training solutions. This situation is illustrated in the conflicts which emerge in trying to steer an acceptable course between training for job preservation and training for predicted skill requirements (Hartley (1976)).

These difficulties at national policy level can be matched, and may stem from, those encountered at the level of the organisation, one of the most intractable of which is that of agreeing the functions and roles legitimate to the T.O. in the organisational environment. There exists a wide range of literature which is largely polarised round two main expectations of what the T.O. should do to attain 'status', 'credibility' and 'professionalism'. At one end of the spectrum of expectation there is the practitioner - based recommendations of the now defunct Central Training Council (CTC (1966)) - comprising the trainee-orientated functions of assessing training needs, formulating and implementing training programmes and assessing the effectiveness of training - and at the other end of the spectrum demands for the application of sophisticated interactive techniques in OD - related consultancy roles where the focus is on organisational effectiveness (Reddin (1968)). These wide variations in expectations, values and viewpoints are not confined to the literature of training but also exist in the policy statements of Training Boards in which the traditional expectations of the Carpet ITB (1975) co-exist with

those of the more complex relation-orientated view of the Chemical and Allied Products ITB (Pettigrew and Reason (1979)).

Unfortunately, many of the views expressed about the nature of training and the prescriptions suggested for the application of specific types of training appear to derive from limited research or the largely impressionistic views of practitioners and often relate to what trainers 'ought' to do in situations where there is little or no objective evidence or support for the hypothesis or viewpoint presented.

Two major researches have been undertaken in the UK in attempts to distinguish the 'actual' from the 'ought'. Rodgers et al (1970) concentrated on the 'difficulties and distastes' of the T.O.'s job in their survey into 'who industrial training officers are, where they are employed and what they do'. The Engineering ITB (1973) related their research to the scope of the T.O.'s job in the industry and their responsibility but also examined career aspirations and personal training needs. A central theme in both of these studies was the attempt to establish role patterns from the perceptions of job holders but neither of the studies succeeded in isolating a universally accepted pattern of roles or job themes common to all respondents although the Rodgers et al study, while arguing that "each job had its own unique pattern", did hypothesise the existence of four broad levels of trainer (group T.O.'s, company T.O.'s, establishment T.O.'s and secondary T.O.'s). A smaller study, commissioned by the Chemical and Allied Products ITB (Pettigrew and Reason (1979)), while concluding that "there is no one 'Role of the Training Officer'", discerned 'patterns of role interpretation and behaviour' and 'different styles of operation' with the common factor being "the issue of managing the fit between their own style, abilities and values, the culture they worked in and the constraints and opportunities coming from the received need of the training role in their firm".

The American Society for Training and Development (ASTD) has made a series of notable attempts to both identify patterns of training requirements for individual training officers (they use the term Training Director which appears to coincide with our T.O.) and to define professional requirements: in 1974 they published a Professional Development Manual which contained suggested reading for self-development; isolating six skill areas largely corresponding with those of the CTC (1966) model. Two years later they evaluated and extended their earlier work and developed a 'preliminary role model of training and development competencies' (Pinto and Walker (1978)) which comprised: professional competencies (e.g. "scope and structure of training operations"); consulting competencies; managing, developing and administering programmes; facilitating learning. They also included a 'people problem' and counselling 'general' category. This model broadly coincided with the roles and sub-roles approach of Nadler (1969, 1970) who defined three roles for the trainer (Learning Specialist, Administrator, Consultant) and described a set of sub-roles relating to each primary role. The Nadler model was also incorporated into a Federal Government developmental programme for Employee Development Specialists (EDS) in a Civil Service role model (Chalofsky et al (1975)) which contained a group of 'core' requirements and the additional function of career counsellor. But Chalofsky (1975) warned against the use of the model as "the definitive source of knowledge for all applications", and underlined the need to "differentiate training requirements on the basis of individual job variables".

The Canadians (Kenney (1976)) also independently developed a series of core competencies based on the practical experience of a set of task groups and have produced both a practical 11 point core competency model and a self-development diagnostic document (OSTD (1979)) which practitioners can use to carry out a competency analysis on their current and future job competency requirements.

The professional bodies in the UK (ITD (1980) and IPM (1979)), while accepting the need for foundation studies in related theory as part of the developmental requirement for membership, are also accentuating core-competency and job-related skill requirements and so following the current trend of job-related requirements rather than the broader and more abstruse concept of professionalism.

The general trend in most commentaries and studies of T.O. roles has been characterised by an interest in technical roles or job items, with a concentration on the quantitative comparison of roles, or more accurately, role titles. It is only relatively recently (Pettigrew and Reason (1979), Grintner (1979)) that concerted attempts have been made to open the debate by considering such factors as the power bases of the T.O.; the relevance of the T.O.'s position in the organisational structure and the inter-dependent effects of personality and work style (Smith (1976)). The work of Pettigrew and Reason (1979), with its role-person-culture theme, has extended our horizons by conceptualising a series of non-judgemental perspectives ranging from the T.O. as a 'Passive provider' to that of the T.O. as a 'Change agent' operating within the context of 'acceptable deviancy'. This study underlines the importance of role relationships and examines the factors determining the power of the T.O. to acquire and dispense resources: Pettigrew and Reason suggested that technical competence in training may well be secondary to the ability to develop successful relationships.

The proliferation of viewpoints on what comprise the roles essential to the operation of the practising T.O.; the paucity of objective information on the T.O.'s function and the continuing inability on the part of training policy makers and T.O.'s to establish an acceptable set of evaluative or cost-benefit criteria for training activities at both national and grass root levels, all coexisted at a period of time when there was a bludgeoning demand for T.O.'s and a resultant pressure for training courses.

Approximately ten thousand T.O.'s attended the CTC pattern introductory sandwich course run by the Further Education sector between 1965 and 1977 (MSC (1978)). The membership of what is now the Institute for Training and Development (formerly, the Institution of Training Officers) has increased from 4,414 to 6,700 in the 1972 to 1981 period; there has been a parallel expansion in the membership of the Institute of Personnel Management from 15,821 to 22,617 members in the same period.

The actual initial training given to T.O.'s in this period was affected by the wide disparity in approaches to the training function and possibly the availability of teaching resources (Tyson (1970)). There appeared to be, with one noteworthy exception (BACIE (1962)), no effort to base initial training on concerted or co-ordinated grass root analysis, or consensus, of what T.O.'s actually did in their organisational environment. The CTC (1966) certainly provided guidelines on what was assumed to be 'good practice' but there is little evidence to suggest that this was adhered to by course-running establishments or uniformly relevant to course members. Tyson (1970) castigated some course runners for failing to meet the minimal requirements of the CTC and others for following their recommendations "in a completely blinkered fashion". A later paper (Donnelly (1979)) illustrated the continuing existence of wide variations in the subject titles and duration of introductory courses without making any value judgements on their relevance to course members or their organisations due to a difficulty in determining the actual content of programme items.

This problem of apparent disparity in course design and content is currently being examined through the concerted efforts of practitioners, training organisations and course runners under the aegis of the MSC, who have helped establish and develop a foundation course content (MSC (1978)) round a series of "common areas of know-how" and "areas of specific knowledge and skill" derived from a consensual 'core

competency' model. The earlier difficulty encountered in the apparently widely differing introductory courses is now being tackled using peer assessment and voluntary registration.

What is now required is a series of validation and evaluation studies designed to measure the extent to which current hypotheses, assumptions and beliefs about the training function are relevant to the actual requirements of T.O.'s in increasingly cost-conscious organisational environments and to determine the content and relational context of roles which are assumed to have universal validity.

This study attempts to make a contribution in this field by examining the developments in the jobs of a group of practising T.O.'s in order to help determine the extent to which these developments coincide with, or differ from, current practices, beliefs and research findings. The opportunity has also been taken to validate and evaluate the initial T.O. training which respondents received at the Middlesex Polytechnic Training of Training (introductory) course and compare the objectives of the course with the expectations of course members.

AIMS

The major aim of this study is to examine the training implications of developments in the work of a sample of T.O.'s in the context of relevant studies carried out in the UK and the USA over the past twenty years. It was felt that this aim could best be attained by establishing a series of both general and specific sub-objectives. These sub-objectives were as follows:

(a) to extend our existing knowledge of the work of practising T.O.'s;

(b) to compare the work of a sample of T.O.'s with relevant findings emanating from other researches;

(c) to consider the extent to which the largely impressionistic views in training literature of what T.O.'s should be doing compares with respondents' perceptions of what they do;

(d) to determine respondents' perceptions of time-consuming, difficult and key role areas;

(e) to examine the ways in which respondents' roles have changed over a three year period;

(f) to investigate the viability of the hypothesis that there is a set of roles common to all T.O.'s;

(g) to attempt to establish a relationship between the size of a firm and the roles of respondents;

(h) to examine the relevance to their jobs of the introductory training received by respondents, the extent to which course objectives were fulfilled and how respondents envisage their future training needs;

(i) to suggest ways in which the training of T.O.'s can be developed in the light of these research findings.

Sequence of Material

Since the study is mainly concerned with developments in the job of a sample of T.O.'s, in the context of the training of T.O.'s, it was considered necessary to initiate the study by examining, in an historical perspective, the ways in which the job of the T.O. has evolved since the 1960's. This period was used as a base line as it marked an upsurge of interest in the contribution of training to industry and commerce when attempts were first made to determine the training requirements of new and existing T.O.'s. This historical material is largely of a background nature and, as such, has been placed as an appendix (appendix (i)) at the rear of the report. This appendix traces the main factors which helped form role expectations in the training function and outlines the ways in which researchers, writers on training, government agencies and professional organisations have interpreted the basic functions of T.O.'s. Training literature is examined as a potential source of role expectations and the results used as part of a comparative base against which to attempt a comparison between the 'actual', as perceived by respondents and the 'ought' of hypotheses and - more commonly - the largely impressionistic views of practitioners and writers on training.

The main body of the study comprises four sections: (i) the T.O. in the context of his organisation, (ii) the training roles performed by respondents, (iii) content of main role areas and, (iv) respondents' training requirements.

The first of these major sections (section 3) examines the work environment of respondents and their biographical background and investigates their routes into training and the ways in which their training function is organised. The relationship between respondents and their managers is analysed in terms of the frequency and usefulness of contacts. Attitudes and expectations of respondents and their managers

to key areas of the training function are also studied and compared.

Training roles are examined in section 4, both in terms of their quantitative and qualitative aspects, over a 5 year time span. An attempt is made in this section to distinguish between roles performed, role expectations and role areas in which respondents perceive as their areas of impact and the concept of a common set of roles for all T.O.'s is investigated. This section also considers the career aspirations of respondents as an aspect of their future training requirements.

Section 5 extends the examination of role areas by attempting to establish the extent to which there is a consensus among respondents regarding the task content of commonly used role titles. The administrative aspects of the T.O.'s function is also considered in this section along with the training techniques used by respondents. The application of OD is examined in the training context with a view to determining the extent and effectiveness of its usage as a training strategy and the measure to which respondents are involved in its application. Section 5 also examines the relative importance of Training Boards as a formative factor in the structuring of training requirements and looks at the attitudes of both respondents and their managers to Training Board staff and, specifically, their reactions to the concept of grant maximisation.

The initial training which respondents received is validated and evaluated in Section 6: this is done in terms of fulfilment and relevance. The post course training received by respondents and their perceptions of future requirements are also examined in this section. Conclusions are drawn in Section 7 and related to the future training and development requirements of T.O.'s: pinpointing essential areas of need.

SECTION 2

METHODOLOGY

The Sample

The sample for this study was taken from past members of the Training of Training Officers (introductory) course run by the Middlesex Polytechnic: respondents' managers were also asked to participate in part of the study. The decision to use this cluster sample was taken for two main reasons. First, it was considered that an in-depth investigation into the developing roles and relationships of T.O.'s would require a lengthy questionnaire and that such a questionnaire was more likely to have a high response rate if the respondents were personally known to the researcher. Second, the opportunity could also be taken not only to measure developments in the roles and relationships of respondents over a period of time (3 years) but also to validate and evaluate the Middlesex Polytechnic T.T.O. course content in terms of the fulfilment (or otherwise) of a broad set of course objectives and to gauge the relevance of these objectives to the continuing development of respondents in their work environment.

The initial sample for the present study was obtained by making a list of individuals who had attended the Middlesex Polytechnic Training of Training Officers (introductory) course between 1970 and 1976: a total of 226 T.O.'s. Overseas students (4) and Training Board staff (29) were subtracted from this total: the former were extracted as the study was limited to the UK and the latter because the job of Training Board T.O. (or, more commonly, Training Adviser) was accepted as being different from that of in-situ T.O.'s. A point which is well made in the Hotel and Catering I.T.B. study (Cotgrove and Johnson (1973)): the Training Adviser's task "is a complex one in which he faces two ways: drawn on the one hand to try to meet the needs of his client, yet remaining an agent of public policy".

A decision had to be taken on the extent to which it would be realistic to expect respondents to answer questions about a course which they had attended up to nine years previously although it was appreciated that course members in this category could provide a fruitful source of information on important areas such as role developments within the last three years. It was decided to limit the computation of the final sample to a group of past course members who attended the course between October 1973 and October 1976 in the belief that this was likely to be a more realistic time span within which to expect reasonably accurate recall.

The ~~final~~ INITIAL sample comprised a group of 103 past course members of whom 21 were from I.T.B's and 3 from overseas. These two groups were subtracted giving a total of 79 potential respondents. Questionnaires ~~(appendix (ii))~~ were sent to this group along with a covering letter ~~(appendix (iii))~~. Useable responses were received from 58 respondents: a response rate of 73.4%. This was achieved by the use of a reminder letter followed by telephone calls in situations where it was considered responses could be expected. A total of 32 of the T.O.'s managers (55%) completed the comparative section on Management and Training.

The use of such a limited sample frame had obvious limitations which would affect the content and applicability of subsequent findings. The size of the sample in relation to the total population of T.O.'s in the UK meant, "leaving the field of description and certainty and entering that of inference and probability". (Moser and Kalton (1971)). There would be no guarantee that the sample accurately reflected the functions of roles in different sizes of firms (although there was a fortuitious spread of firm sizes in the field sample) or in a wide span of industries. Even given that the initial sample covered a diversity of industrial training situations there would be the additional problem of the affect of non-responses on the accuracy of

returns: would responses tend to come from 'satisfied' clients who would be more likely to give idealised or diplomatic responses thus supplying a positive bias to subsequent findings? There would also be the problem of compensating for non-returns, possibly due, on the one hand, to competent T.O.'s being promoted to non-training jobs or, on the other hand, T.O.'s moving out of training because they failed to meet their own, or management's expectations. The projected sampling frame, although it comprised a convenient sub-group of T.O.'s, may, therefore, be assumed to lack a series of relevant elements in terms of the UK T.O. population but results from the study could hopefully be tested against two main sets of role expectations and findings: (a) the largely impressionistic views of the T.O.'s job emanating from much of the literature on training ~~(appendix (i))~~ and, (b) the findings of in-depth researches into the T.O.'s job, particularly those of Rodgers et al (1970), the Engineering ITB (1973) and the American Society for Training and Development (1978). The former research was based on a random sample derived from a preliminary survey used to locate a representative sample of T.O.'s which covered most size/industry categories in the South East of England. The overall response to this survey was 68.5% (292 respondents) comprising: 248 respondents from private organisations and 44 from nationalised industries. The response rate for personally addressed questionnaires was 90%.

The E.I.T.B. sample population was determined from an initial survey structured to gain background information on T.O.'s in the engineering industry. Their final sample frame, stratified by firm size, geographic region and industrial groupings, comprised 12% of the firms in the industry and 14% of its T.O. population. Proportional sampling (1 in 3) was then taken in firms having a large number of T.O.'s to extend the representative nature of the final sample. There was a slight bias against larger firms (5000+). The final frame comprised 622 respondents and a response rate of 80% (487 respondents) was attained. This was made up to 500 respondents by including pilot questionnaires.

The ASTD research was based on returns from questionnaires sent to 14,028 members of the ASTD in Canada, the USA and Mexico and included some respondents from outside North America. There was a useable response of 2,790 (19.9% response rate). It was considered (Pinto and Walker (1978)) that, while the response rate was low, the sample was nevertheless representative since the initial sample contained a number of non-practitioners who would have been unable to complete the questionnaire (e.g. students, academics, consultants). But the response was heavily biased towards members having an academic qualification: possibly due to an unwillingness on the part of the less academically endowed trainer to answer a lengthy (121 questions) and complex (most questions had a 6-part qualitative rating) questionnaire.

Each of the above researches, while painstakingly structured and rigorously applied, had limitations in the context of the present study. The Rodger et al study, although published in 1970, was carried out two years after the passing of the 1964 Industrial Training Act at a time when the function of the T.O. was relatively new and there was little objective criteria against which to compare and interpret findings. While the Rodger et al research considered qualitative elements in investigating the relevance, difficulty and importance of roles and the attitude of managers to training it had, like the EITB and ASTD studies, limited perceptions to those of the job holder. The EITB study obviously related to one industry but the very small number of job items which it utilised (15 multi-role groupings), severely limited its applicability as a source of comparison on role areas. One of the main enigmas set by the comparative use of the ASTD findings, apart from that of the low response rate, was the difficulty in discerning the similarity, or difference, that can be safely assumed to exist between the American function of Training Director and that of the UK Training Officer: such apparent variables as demographic factors and job expectations may affect the extent to which it is possible to directly compare American findings with their UK counterpart.

DEFINING THE JOB OF THE T.O.

A major problem encountered at the outset was that of deciding on an approach to the definition of the T.O.'s job. An initial decision was taken to consider the job as comprising a series of roles and obtain a list of roles performed by respondents: using the term 'role', as defined in the Oxford Dictionary, to mean 'a task or function'. This approach, while appearing to have the essential requirements of clarity and simplicity, had certain limitations in a study aimed at isolating patterns of activity and change in T.O.'s jobs for training purposes.

The use of the broad term 'role' may conceal the difficulties inherent in isolating and distinguishing the multiplicity of activities which can be contained in a role area, particularly in commonly used role areas. For example, the role area of 'working with management' appears extremely vague but was considered important enough to include since it appears to represent the distillation of a series of requirements which respondents are likely to find necessary for their success and may be assumed to comprise an ability to work with decision makers in the organisation. It implies a sensitivity to managerial problems and attitudes and an ability to gain acceptance and cooperation from managers.

Similarly, the isolation of specific role areas may suggest an artificial compartmentalisation and lack of inter-dependence or overlap between roles and role activities. It could be argued, for example, that an inability to perform effectively in the role of 'developing training contacts' could adversely affect the respondents' effectiveness in many other role areas.

The role perceptions of job holders may not necessarily coincide with those of their colleagues or their managers. This possibility (or likelihood) of varying perceptions creating different, and possibly conflicting, views in the

context of training roles is illustrated by Pinto and Walker (1978). They argued that there are a complex of viewpoints emanating from both the individual trainer and his manager which can vary from: what the individual plans to do, through to what the manager thinks he is planning, to the desires of the trainer as against those of his manager; the perception of what individuals think they do compared with that of their managers and the reality of what they actually do. The researches carried out on the job of the trainer in both the UK and the US relate largely to the job holder's perception of what he does although, as Pettigrew (1973) has argued, the choice of activities that the job holder actually undertakes is limited by the job holder's perception of what he thinks he should be doing, which in turn is affected by the information available to him and his location in the social structure of the organisation.

The very pressures which have helped generate the need for training may themselves be a major formative factor in roles and role expectations. For example, statutory enactments, particularly the Training Acts of 1964 and 1973, have not only generated an increase in the demands for training officers but have led to role expectations, in some instances of the training officer as a training board administrator and grant maximiser, shifting the determinants of training roles from internal criteria to external demands designed by training boards to meet the needs of an industry or a particular size of organisation.

The contributions of academics and consultants have also had important repercussions in the role expectations of training officers, particularly in the application of techniques stemming from advances in the behavioural sciences and specifically in the context of the training officer as an agent of change in the organisation. This could give rise to role expectations on the part of some practitioners which may be at odds with the simplistic tradition of the training officer as the individual who organises courses and liaises

with educational institutions at craft and junior management levels.

The role expectations which an organisation has of its training officer will be determined to some extent by its value system and the ways in which management, consciously or otherwise, evaluates the factors motivating its employees. For example, if they view individual employees as self-actualising individuals (in the mode of Maslow (1954)), they will incline towards a training system which relies on self-motivation and self-control with an adaptive organisational structure and a leadership sensitive to the need for self-development. In these circumstances training will be employee and learning-centred and highly participative in content. A bureaucratic style of management will tend to generate set rules, procedures, a well-defined hierarchical chain of command and highly formalised, mechanistic, teacher-centred training programmes.

Attempts to define the job of the training officer are made more complex by the understandable desire among both practitioners and academics to develop the job of the training officer beyond the constraints of job-related role competencies into the realms of professionalism and the status that such a position engenders. Although it could be argued that status and credibility are determined not by the formal trappings of professionalism but by proven success in the context of job performance.

It is apparent from the above that a decision to use an unqualified and purely quantitative approach to the definition of respondents' role activities would result in a mere listing of role areas without any indication of the actual degree of relevance of the roles to the job holder or their relation to organisational requirements. It was, therefore, considered necessary to introduce a qualitative element into the study by asking respondents to evaluate the importance of their roles in terms of key areas, difficult and time-

consuming role areas. This approach was used successfully in the Rodger et al (1971) study. An additional, if limited, attempt was made to overcome the weakness of earlier researches by not only examining role relationships with T.O.'s managers but also obtaining the comparable perceptions of managers to a broad set of training areas. It was also hoped to deepen our knowledge of the T.O.'s job by giving respondents an opportunity to list the roles they were not performing but thought they should be performing and the roles in which they felt they were making an impact on their organisation. In addition, views were sought on two further areas of concern: the extent to which T.O.'s are actively involved in the application of OD techniques and their reactions to Training Boards.

Design and use of questionnaire

The number and diversity of sub-objectives identified as a necessary starting point for the fulfilment of the study's aims pointed the need for a highly structured and detailed questionnaire as a basis for the collection of information in what has been regarded (Rodger et al (1971)) as a heterogeneous job.

However, it was recognised that the use of questionnaires as a means of supplying information for occupational studies has certain drawbacks. Oppenheim (1966) and Moser and Kalton (1971) have examined some of the problems arising from the use of questionnaires for research purposes, many of which have particular relevance in the context of studies done on the training officer's job. These problems include: the limited ability of some respondents to make semantic distinctions; the difficulty of computing verbal material; the problems of response (self-selection, selective memory, faulty interpretation, the difficulty of accounting for a multitude of variables); errors in sample design and misconceptions in the perception of respondents. But, even given the above limitations, the questionnaire will probably continue to be one of our most important techniques in this area.

The problems generated by a heavy reliance on interviewing techniques using open-ended questions, illustrated in the Rodger et al (1971) research, confirmed the need to use a format which was both comprehensive, easy to complete and computable. It was, therefore, decided to use a structure comprising a series of close-ended questions with the use of a minimal number of open-ended questions where it was felt that there was a need for respondents to express views or extend existing listings.

The first part of the questionnaire (Appendix ii) was designed to cover the biographical details of respondents

and attempted to answer such questions as: 'who are we investigating?', 'what are the educational and industrial backgrounds of respondents?', with a view to getting some background information on the types of person likely to be trained as a T.O. This approach would contribute to the examination of assumptions made about the potential for professional attainment of T.O.'s and so help gauge the ability of trainee T.O.'s, "to understand the needs of industrial and commercial business or administrative organisations and of the individual, ... to inentify the training requirements and competent to advise management on its responsibilities in the field of development and training" (Morris (1974)). Biographical questions included those on the educational background of respondents; membership of professional organisations; job history over the last three jobs.

It was also considered important that an attempt was made to determine the post-T.T.O. (introductory) course training received by respondents. This was done by using a checklist of 43 training activities as a means of determining likely post course training requirements and for the possible identification of role areas which should be covered during the initial training period. Respondents were asked to indicate the relevance of this post course training to their present needs.

Relationships with managers, their attitudes to training and the reactions of managers to both respondents and the training function - areas largely ignored in earlier researches but effectively conceptualised by Pettigrew and Reason (1979) - were to be explored in three main ways. First, by determining the reporting levels of the T.O. and his boss and using this as a broad indicator of the position of training within the organisational hierarchy, possibly reflecting the status and acceptability of the respondent. Movements in these reporting levels would be gauged over a three year period to define a developing change pattern of

roles over time. Second, by obtaining the perceptions of respondents to the attitudes of their managers to categories of trainees. Third, by listing twelve major statements about expectations to aspects of the training function. This listing was derived from training literature, mainly: the DE Glossary of Training Terms (1971), Local Government Training Board (1976), Institution of Training Officers (1972). Respondents and their managers were asked to indicate independently their reactions on a 5-point Likert-type scale. This latter section was considered to be of considerable importance as a means of checking the congruency, or otherwise, of the perceptions of trainers and their clients within a service type relationship in which acceptability by management in the organisational culture may be a key to success (Pettigrew and Reason (1979)). This latter publication became available when the research was at an advanced stage. Two major decisions had to be taken prior to designing the main section on roles. First, since the central theme of the research was that of examining developments in the work of respondents, a decision had to be made regarding the time span within which it would be realistic to attempt to measure these developments. A time span of three years was used with time-related questions being designed to discern the pattern of roles carried out in the past year as compared with those carried out three years previously. It was considered that the one year period was small enough to even out short term or immediate role variations while the longer span would be sufficient to detect longer and possibly more distinct patterns of change without unrealistically extending the memories of respondents.

Second, it was necessary to decide on whether simply to use the study to measure existing assumptions and hypotheses about training roles or to attempt an extension of these views by using a further variable. One variable which had been touched on but never fully explored in the Rodger et al study and included in a 'training decision model' by

Pettman (1972) was that of firm size. It appeared logical to hypothesise the existence of a relationship between the size of a firm and the T.O.'s role requirements since small firms would appear to require an ability to operate in a wide span of roles while the T.O. in the larger firm was likely to have a wide band of support services and to specialise in specific categories of training. The term 'firm' was used to cover both the situation where a respondent was employed in the main site of an organisation or in a unit of a large organisation: it covered the number of people for whom he had a training responsibility. The six-point grouping was based on that used in the Rodger et al research but modified to meet the needs of the present study.

The central part of the questionnaire comprised a check-listing of roles from which respondents would be asked to indicate their role activities both at present and three years ago so that role developments could be compared with previous studies, and hypotheses relevant to the training of T.O.'s tested. Attempts to select what were considered to be relevant role areas isolated a series of difficulties in the definition of role areas one of which was the number of possible interpretations which could be placed on, what are often considered to be, common and essential role areas. For example, the apparently innocuous role of 'administration of training' has a wide variety of meanings including: the part-time administration of operative training, the administration of company-wide training, or possibly, the full-time filing of Training Board returns. It was, therefore, considered necessary even at the risk of increasing the complexity of the questionnaire to separate role areas from trainee categories. This was done by using a matrix structure to determine the categories of trainees trained against the types of training activities involved in the training of these categories. Ten trainee categories were selected and three major training roles (types of job training analyses, administration and evaluation) with changes plotted over a three year period. The matrix was

also used to distinguish training from administrative activities. A further section was added to determine management's attitude to each category of trainee.

The main checklist of 56 roles was derived largely from three previous researches aimed at the determination of role areas (a) Rodger et al (1971), (b) American Society of Training and Development (1978) and (c) the Engineering Industry Training Board survey (1973). The Rodger et al (1971) research focused on the 'difficulties and distastes of the job' and listed 42 activities in a research questionnaire which was a model of clarity and compression. The ASTD job items were obtained from documentation supplied to their members as part of a large survey containing 91 job items aimed at defining "the basic skills, knowledge, understanding and other attributes required of professionals for effective performance of training and development activities". The EITB (1973) research was less helpful in this context as it concentrated on 14 main job description items (Table 1) in its survey of 'the employment, qualifications, career paths and training of training officers in the engineering industry'. The present research followed the path of the Rodger et al and ASTD studies in attempting to cover most facets of the job even to the extent of using such common job items as 'travelling between sites' and 'working with T.U.'s'. Respondents were also given the opportunity to specify roles not listed.

This checklist format could, therefore, be used to test, albeit in a limited form, the hypotheses contained in two main sets of studies. The Manpower Services Commission (1978) study, while accepting the wide diversity of activities in T.O. jobs, hypothesised that there are a series of core competencies common to most T.O.'s and have used this practical approach as a basis for the definition of 'common areas of know-how' and 'areas of specific skill and knowledge'. The Ontario Society for Training and Development (1979) have also taken this approach but enlarged on it

by listing, in a matrix format, a series of possible knowledge, understanding and skill requirements against a four-fold job sub-division: instructor, designer, manager, consultant. In this approach the individual uses the checklist as a self-development document listing present competence against perceived requirements in each role by supplying a person/job variance rating and so defining personal training requirements.

A major hypothesis of the Rodger et al study was that there were four groupings of T.O. determined by levels of responsibility exercised but it was not considered possible to test this hypothesis in the present research as respondents were all relatively new to the job having previously completed an introductory course between three and six years before the research. However, it would be possible to compare results with the qualitative findings made in the Rodger et al study given the use of similar factors in the questionnaire. This qualitative element was covered by using two criteria used in the Rodger et al research: asking respondents to indicate the time-consuming and difficult parts of the job. A further 'key area' column was added to determine what the respondent perceived as areas essential to the effective operation of the training function: the Rodger et al study had a somewhat similar column headed 'important?'. Respondents were also asked to list, in a 1 to 10 format, their most important roles but this response later proved impossible to compute as respondents had difficulty in making such a listing. The opportunity was taken to ask respondents to list the most important snags in their job so that a comparison could be made with a similar question in the Rodger et al study. It was considered that this explanation of difficult job areas would provide a useful source of information on which to base initial and developmental training for T.O.'s as a realistic preparation for difficulties likely to be encountered in their organisational environment.

Since the aim of the research was to use the role perceptions of practising T.O.'s and to test current hypotheses and impressionistic assumptions about roles it was decided that the questionnaire could also be further utilised to gain perceptions on role content. It would not have been possible to investigate in detail activities within all the role areas but it was considered essential that at least six role areas should be examined in some depth. These areas were largely selected from recurring job activities in previous researches and comprised: job training analysis, administration of training, evaluation, determination of training needs, training techniques and budgetting. The first three areas were integrated into the trainee category matrix mentioned above and the remainder covered in questions set independently. While this approach to the determination of the perceptions of role holders is likely to extend our knowledge of what respondents actually do in the fulfilment of a role and hopefully lead to the isolation of learning requirements, it does not answer the question of "Why" the role is performed in a particular manner or explore the organisational pressures and motivational determinants of role interpretation investigated by Legge (1978) in the context of Personnel Management and Pettigrew and Reason (1978) in that of T.O.'s.

The focus of the study was to help determine the training needs of T.O.'s from developments in the job of respondents over a three year period the decision was taken to concentrate the questionnaire on the actual roles of T.O.'s, as perceived by respondents and, to a limited extent, their managers. It was considered that any attempt to go beyond this position into 'why' the roles were performed would result in a study the central themes of which would have been concerned with the later Pettigrew and Reason (1979) relational trilogy of role-person-culture in the major context of resource availability and job satisfaction and not, in the first instance, training.

A major review of the objectives and training methods used

on the Middlesex Polytechnic T.T.O. (introductory) course was being undertaken during this research in order to meet the most recent MSC recommendations (MSC (1978)) on the training of T.O.'s. It was, therefore, decided to utilise part of the questionnaire to obtain feedback from respondents on the objectives of past courses as a means of extending the relevance and applicability of findings in the context of the developmental requirements of future T.O.'s. Respondents would be presented with a list of the 14 main objectives common to all previous Middlesex Polytechnic T.T.O. (introductory) courses since the early 1970's. These objectives were based on the original Central Training Council documents (1966, 1967). They would be asked to indicate whether the course objectives had been: (a) fulfilled or unfulfilled and, (b) relevant or irrelevant, to their jobs. It was envisaged that the returns in this section would require to be interpreted with care as some of the respondents would have to recollect over a six year period. It would not be possible to test all the course objectives of the current courses since modifications had been made using feedback obtained from students. Subject matter and learning methods have also changed over the years to meet changing insights and expectations.

The opportunity was taken to examine two facets of the effects of Training Boards on the training function in order to determine training implications: (a) the extent to which the allocation of training resources is determined by the desire to maximise grant payments: "one of the variables to be considered in the decision to initiate, or improve, training". (Pettman (1970)) and (b) the relationships between both respondents and training board staff and training board staff and management: how realistic is the expectation that training board staff can move from an inspection to a client-centred advisory role as postulated in the Cotgrove and Johnson (1973) study? This part of the questionnaire was structured in two parts. In the first part respondents were asked to describe the relationship

between them and board staff and to indicate their perception of the relationship between board staff and their management: a three-part rating was used (co-operative - apathetic - hostile). The second part of the question related to the organisation's orientation to grant maximisation and a further threefold sub-division was used: very - marginal - not. The accentuation in the area of training boards was on training board staff as it was considered that views on such amorphous entities as 'training boards' and 'government agencies' would be less relevant in the relational context.

As there is likely to be a relationship between career aspirations and the future training requirements of respondents, as illustrated in the EITB (1971) research, they were asked to indicate, by answering an open-ended question, the positions they expected to fill in three years time. The responses to this question could also be used to indicate possible trends towards the use of training as one aspect of a broader, and different, 'human resources specialist' role as envisaged by Rodger et al (1971).

The completed pilot questionnaire was sent to five respondents, who represented five different types of industrial classifications and four of the six firm sizes, to check the contents for comprehensibility and relevance. These respondents were then interviewed to discuss the content of the questionnaire and potential areas of difficulty. These discussions led to the addition of a further six roles. Some doubts were expressed by respondents about the usefulness of the question on gross salary but it was retained since answers could possibly be used to indicate movements in the status and acceptability of respondents. It was later considered that there were too many non-training variables in the computation of salary levels and responses to this question were not used.

The modified questionnaire (appendix (ii)) was then sent

out with a stamped and pre-addressed envelope and a covering letter (appendix (iii)) which outlined the purpose of the research and underlined the point that the study was being undertaken with the focus on the viewpoint of the job holder. But the questionnaire also contained a pull-out section which duplicated the series of statements on training and respondents were asked to pass this on for independent completion by their most senior line manager in order that a comparable managerial reaction would be obtained. Managers were asked to return this part of the questionnaire directly to the Middlesex Polytechnic. A further letter was sent to those who failed to respond to the first letter: this contained a stamped and addressed envelope and a copy of the questionnaire.

Returns were analysed on a DEC-10 computer using SPSS packages capable of handling 1000 variables. A total of 56 tables were established from the questionnaire material covering such areas as biographical details, trainee categories and attitudes to training but with a concentration on three main sets of variables:

(a) Top 20 and bottom 10 roles with size of firm;

(b) Role changes over a 3 year period by size of firm;

(c) Difficult and time-consuming roles and key areas by size of firm.

A Spearman Correlation was used to compare the 'all firms' top 20 roles with those in each firm size category over the one and three time span and also to relate the 'all firms' key areas with each of the firm size groupings.

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SECTION 3

RESPONDENTS AND THEIR ORGANISATIONS

Respondents came from a wide span of industries: 13 of the 26 industries represented in the Standard Industrial Classification (1968) with a concentration on Engineering, representing 23% of the sample (table). The Food, Drink and Tobacco and Paper, Printing and Publishing industries were also well represented with 15% and 13% respectively. The 10% covered by the Administrative, Financial and Professional Services classification came in the main from banking and insurance. The numbers involved in the survey (n = 58) will certainly diminish the relevance of respondents' industrial background in terms of the development of a relationship between industry and job content, but may be of use in indicating the possibility of similarity, or difference, in role expectations between the main industrial groups represented and particularly between the largest single group (Engineering) and the role expectations emanating from the EITB (1973) study: this latter point is investigated in section 5.

The high level of Engineering respondents is not surprising as this is the largest industrial grouping of employees in UK industry: a situation which was reflected in the Rodger et al (1971) study in which over one-third of sample of Private T.O.'s were in the Engineering and Electrical Goods Industry.

It was considered that the job of a T.O. is potentially related to the size of the organisation or unit within which he works and not necessarily to the size of the employing establishment of which his organisation or unit may be a part: respondents were therefore asked to specify the number of employees in their organisation or unit. The term 'firm size' is used throughout this study as a convenient phrase to denote the size of the organisation

or unit within which the respondent has training responsibilities.

There is little evidence to suggest an acceptable norm for the span of employees which can be covered by one T.O., but this is not surprising when the interacting and often complex variables which can determine roles are considered: these variables have been examined in the context of the historical perspective (appendix (i)) and in the factors relevant to the training requirements of T.O.'s (section 6). Since it was envisaged that the sample would comprise both full-time and part-time T.O.'s and also that the size of firm may be an important consideration in terms of role requirements, it was therefore essential that a numerical sub-division should be used which would encompass the unit size of all respondents' firms and also supply a manageable number of groups. It was therefore decided to have a lower limit of 100-299 rising in groups of 300 to the 1000 size and then in 500 units with an upper limit of 2000+. This grouping was based on the Rodger et al (1971) sixfold grouping which started at the 'less than 100 employees' level and had as its maximum grouping the 5000+ band. The latter figure was justifiable in a study covering the complete gamut of T.O. levels and included those having a long experience in training. But since the current work is limited to recently trained T.O.'s it was felt that a lower maximum would be relevant, particularly as the focus was the grassroot organisation, or training unit, job responsibility rather than the overall organisational training requirements of the employing establishment. It was assumed to be unlikely that a relatively new T.O. would have a training responsibility for a large establishment although he may have a delegated responsibility for an organisation or unit within such an establishment.

The grouping worked out effectively in practice as 79% of respondents were in firms of under 2000 employees, with the greatest single grouping (21%) in the 600-999 group,

closely followed by 18% in the 1000-1499 range. While about one-third of respondents were in firms of under 600 employees, a number of them were part-time T.O.'s, although this did not occur uniquely in the smaller size firms (see page 78). One consequence of this mixture of full-time and part-time respondents, with overlapping roles and responsibilities, is that it has not been possible to distinguish the minimal firm size in which it has been considered feasible to employ a full-time T.O. although it has been possible to distinguish broad differences between the roles, problems and expectations of respondents in small as against those in large firm sizes (page 84). However, the EITB study has shown that 92% of all firms in their industry employing over 250 employees have either a full-time or part-time T.O. with a lower proportion (84%) among the 250-499 range of firms and that, conversely, the number of part-time T.O.'s in the 250-499 group increases with 75% part-time T.O.'s as against 49% in the 5000+ grouping.

A point of interest which arises from both the Rodger et al research and the EITB survey, reinforced by the present study, is the large percentage of T.O.'s who are employed within organisations or units of large establishments employing less than 1000 employees: the Rodger et al study has 42% (Private T.O.'s) in this category, EITB survey 34% and the present study 50%.

Biographical Details

The aim of this part of the section is to attempt to gain some insights into the age structure, industrial background and educational attainments, including those relating to training-orientated professional membership, of respondents in order to extend our existing knowledge of the types of individuals likely to present themselves for training as T.O.'s and help determine the likely potential of future Training of Training Course members. It could be argued that each individual has a highly specific training require-

ment but any form of learning in a group context must start off with the assumption that group members have basic skill and knowledge requirements. However, it is essential that any assumptions about course members and their training requirements are continually tested and this can only be done if the course tutor has some understanding of the likely biographical details of course members and is able and willing to test these assumptions against some frame of reference of which the current survey points some possibilities. The biographical details were obtained by examining the age structure of respondents, the age they completed full-time education and their educational and professional attainments, particularly those relating to the training profession.

The average age of the sample was 42 years, with a wide variation in ages (table 7) but three peak areas: (a) 40-49 (38%), (b) 30-38 (26%) and, (c) 50-60 (19%). There was little difference in the average ages of respondents in small organisations when compared with those in larger organisations: the respondents in the smallest firm groupings had an average age of 40.75 years while those in the largest firms (2000+) had an average age of 41.6 years.

The relatively higher average age of respondents illustrates that training in the 1980's is still 'very far from being a young man's occupation' as much as it was in the mid 1960's when Rodger et al carried out their study showing an average age of 42 years for Private industry T.O.'s. This study had three age peaks (n = 213): 40-49 (35%), 30-39 (29%) and 50-59 (21%) which correspond closely with those of the present study (38%, 26% and 19% respectively), indicating an even higher level of age at entry into the training function in this study since all respondents entered training after 1973.

A somewhat similar comparison can also be illustrated with the later EITB (1973) study. This shows a broad similarity

in peaking particularly in two sets of age ranges: the EITB survey peaks on the 40-49 age band with 31.2% of their sample (n = 500) in this range compared with 38% in the present study (n = 58); the second peak in the EITB study also relates closely to that of the present study with the EITB survey having 23.4% as against 26%. But differences emerge in the 20-29 age band: the EITB have a larger group at this younger age level (16.8% as against 12%). The over-60 grouping is similar in both cases at 5.8% (EITB) and 5%.

The earlier Rodger et al (1971) study also illustrated the existence of an older age group within the training function in the middle 1960's: the median age of Private T.O.'s was 42 years and that of T.O.'s in nationalized industries 50 years, with at least 43% of newly appointed T.O.'s in the 35+ age bracket. This is understandable in the context of a newly-emerging profession in which there was no tradition of professional training. The great majority of participants would naturally be recruited largely from the existing reservoir of technically-experienced manpower and there would have been little opportunity at this early stage to think in terms of career paths into and from the training function for immediate postgraduate-level entrants.

The results of these comparisons on age levels of entrants and incumbents indicated the movement of a majority of respondents from positions of experience within other work areas into training and, to a lesser extent, the use of training as an end-of-career activity for the over-50 age group: 24% of the current sample. But there is also an indication both in this study and in the EITB survey of the use of the training function as a part of the initial training of potential management-level personnel with 12% of respondents under 29 years and 17% in the EITB survey. However, there is a relatively lower level of younger entrants in the present sample considering that all participants are new to the training function.

The preponderant viewpoint that emerges is of management or junior management-level personnel moving, or being moved, into training positions often after a period in line management rather than the extensive use of the training function as an initial area of experience for immediate postgraduate personnel with management potential. This viewpoint is reinforced by the results obtained from the examination of the routes taken by respondents in their moves into the training function (fig. 1 page 43a) and by both the EITB and Rodger et al researches. It is of interest to note that the UK trend towards late entry into training is the reverse of that observed in the large ASTD (1978) study in which 64% of training practitioners were under 45 years and 33% under 35 years.

Educational Background

The largest single group of respondents left school at, or before, they were 16 years (table 8) with 5.5% leaving at 14 years, 13% at 15 years and 17.2% at 16 years.

The marginally largest group (19%) left school at 17 years with 17.2% leaving at 18 years. The range of school leaving ages peaks at three points: from 14-16 years (38.2%), 17-18 years (38.2%) and 21-23 years (20%).

A rough comparison with the national average (Russell Report (1973)) shows that respondents had received higher than average educational opportunities when it is considered that 63% of men aged between 32 years and 41 years today left school at 15 years. The sample also compares favourably with the EITB survey in which 69.6% of respondents left school at or before 16 years, while in the Rodger et al study nearly 40% of the sample left school at or before they were 16 years old: a result which is very similar (38.2%) to that of the present survey although carried out 14 years earlier. However, the age of completing full-time education only supplies part of the information

on the educational attainments of respondents, since 14% continued their education on a part-time basis to attain degree-level qualifications.

Levels of Educational Qualifications

There was a large diversity of qualifications among respondents (table 9) in the answers to the question on educational background. 44 (76%) of the 58 respondents answered this question and it can possibly be assumed that the majority of the remaining 14 (24%) respondents did not supply answers either because there was not a specific 'none' category, although there was a 'non-applicable' category, or because it is an area of sensitivity in a profession concerned with qualifications. The most common academic qualification was the 'O' Level G.C.E. with a 31% rate, this was followed by the 'A' Level (12%) and then a broad span of qualifications comprising HNC (8.6%), first degrees (6.9%) and second degrees (5.2%): both the DMS and City and Guilds qualifications were low on the list with just over 3%. A picture emerges in this part of the study of a Training Officer who has left school at about 17 years old with qualifications at, or about, 'O' Level and who either did not continue with further education or, if he did, was inclined towards vocation-orientated education in a further education establishment to HNC level: a minimal number (6.9%) had first degrees and even fewer (5.2%) had a Master's degree. It would appear that there is a greater likelihood of respondents from larger organisations having a degree-level qualification than those from smaller organisations: over half of the 14 respondents in the 2000+ firms had degree level qualifications compared with one out of eight in the 100-299 grouping and 3 out of 9 in the 300-599 firm grouping.

The degree/HNC/HND levels of educational attainment at 22.3% are well below those of the Training Officer sample studied by the EITB in which 35% had qualifications at, or above,

the HNC/HND level although 28.2% had no further-educational qualifications as compared with an apparent 27% in the present survey. The EITB (1973) findings are similar to those of the Rodger et al (1971) study at the top level of higher qualifications with 36% having HNC or degree-level qualifications among Private Training Officers and a similar percentage for Training Officers in nationalised industries.

At attempt was made to examine the relationship between graduate-level (HNC, DMS, degree) qualifications attained by respondents and the level of training for which they were responsible. The results, shown in table 10, show little relationship between these two variables: most of the respondents responsible for director, senior management and management training were not of graduate level and a number of respondents having graduate-level qualifications were not responsible for training at management level.

Professional Qualifications

The expectations of professional bodies in the human resource field have been noted (page 214) and it could be hypothesised that the demand for membership of these organisations will to some extent reflect the measure to which practitioners identify with their aims and view the functions and capacities of these institutions as espousing, enhancing and legitimising their expectations, particularly their demands for both status and acceptability.

There will also be a natural tendency for Training Officers and professional managers to evaluate the importance of membership in relation to the ease, or difficulty, of entry. Both the IPM and the ITD have been directing their energies to the question of entry requirements in order to ensure that new members are accepted on the bases of relevant industrial experience and their capacity to pass formal written examinations in areas which the Institutions

consider to be relevant academic subjects after a period of skill-centred study. The increasing demand by employers for professional qualifications for selection or pre-selection requirements, as evidenced by the content of adverts in Personnal Management (IPM) and the Trainer (ITD), could also be seen as an important monitoring factor in the growing demand for professional qualification in training or the broader area of human resource management.

Respondents were asked to indicate their level of membership in the two relevant organisations (IPM and ITO - now the ITD) and their membership of any other professional organisation. It we assume nil returns as indicating an absence of membership then 51% of respondents ($n = 58$) were not members of either of the professional organisations. The ITD had 10% of associate members and 18% full members with the IPM having 12% of associate members and 12% full members giving a total of 28% with ITD affiliations and 24% with IPM affiliations: there were only two instances of joint membership.

It is a cause for some considerable concern that a large number of respondents were not sufficiently motivated to join either of the professional organisations although it would be unrealistic to assume from this that they had no contact with the outputs of either of these organisations or other organisations, such as BACIE and BIM, both of whom function as sources of information on training and have a high level of participatory training programmes for their members and other management-level personnel.

There was no evidence to indicate that respondents in larger organisations were more likely to be members of the professional organisations, in fact the 2000+ firms had no respondents who were members of ITD and only 3 who were members, or associate members, of the IPM. These findings on membership of professional organisations are somewhat similar to those found in 1966 by Rodger et al (1971) in

that approximately half of both Private and Nationalised Training Officers did not belong to any professional body but their findings on membership of IPM and ITO were even bleaker in that only 10% of Private Training Officers were members of ITO and 17% members of the IPM. Comparable figures are not available for the EITB study (1973) since they did not isolate ITO members but 10% of their sample held the Diploma of the IPM.

It is not altogether surprising that there should be a relative increase in membership of the professional bodies specialising in training, especially since the ITO had only been established a year and a half before the Rodger et al study, but it would appear that the majority of respondents are willing to operate without the potentially developmental backing of a professional training organisation. There are several possibilities which may explain this situation: wide variations in roles may make it appear that individual Training Officers see little relevance in the work of their fellow Training Officers in other organisations; respondents may be having problems in matching their present expectations to those of their organisation and feel that the possibility of a further enhancement of expectations may increase their disenchantment; the increasing demand by professional organisations for some form of academic or experiential entry requirements may preclude or deter non-academic practitioners or those with limited experience; having attained a training position and being accepted in their present organisation, respondents may believe that further study and experience would be either irrelevant or unnecessary.

It may also be the case that the professional organisations are not 'selling' themselves to practitioners as a credible alternative to a self-help approach in which the need for practical, if unscientific, methods appear to be paramount. There is also the possibility that the quest for higher standards of entry in a job area of such considerable

diversity may be leading to the sacrifice of relevance for the goal of professional respectability. In fairness to the efforts of the professional bodies, it could be argued that the lack of demand for entry may stem simply from human inertia and be justified by arguments which have more to do with self-justification than reality. Whatever the reasoning, it is apparent that a small majority of respondents do not feel the need to attain status, extend their professional competence or increase their acceptability by joining their professional organisations.

Job Titles

One of the major difficulties in carrying out research into the training function is the wide diversity of titles used by participants in organisations. This generates a further difficulty in that we are not only faced with the problem of defining the term 'Training Officer' with the aim of determining common areas spanning, for example, differing types of organisations, techniques, levels of operation, specialisms, products, role perceptions and professional requirements, but that the situation is also further complicated by the need to examine the extent to which differing titles may contain the same or different job requirements and expectations. The 58 respondents had a total of 30 job titles (table 11) the most common of which were Training Officer (11) and Training Manager (7). But if the Rodger et al (1971) approach is used in which the root or prefix before the title is removed (e.g. Plant Training Officer) then the totals become much easier to group. Using this approach the two major titles are: ..... Training Officer (29) 50%, and ..... Training Manager (19) 32.7%. The comparable statistics for the Rodger et al research in the area of full-time Training Officers (Private Industry) are: ..... Training Officers (108) 51%, and ..... Training Managers (22) 10%. The EITB research (sample size: 500) categorised six job titles out

of a total of over 70 job titles:

1. Integrated human resources function (10.4%);

2. Personnel Management (including Safety) 15.2%;

3. 'Pure' training (51%);

4. Training Supervision, training school heads, etc., (47%);

5. Training 'sub' specialists (2.6%);

6. Other functional responsibilities (production, sales, etc.,) 11.4%.

An attempt is made later in the study (page 48) to attempt some form of rationalisation in the plethora of titles but the situation which Rodger et al described in their research still seems to prevail, for example, the term Area Training Adviser may relate to a geographic area or a specific area (e.g. product) within an organisation. Similarly a Company Training Officer can be the generalist in a small company covering areas from operative training to the recruitment and training of senior managers. Even when the title appears to be specific, for example, Retail Sales Training Officer, it may relate to a large number of small outlets or to a concentration of departments within a very large establishment. The terms Personnel and Training Manager (3) and Personnel and Training Officer (4) may also be open to a multiplicity of interpretations dependent on such factors as: the efficiency, traditions and credibility of the Personnel function, and the reporting level of the senior manager overseeing the job holder. There is little evidence to suggest that the pressures from professional bodies such as the Institution of Training and Development and the Institute of Personnel Management, or legislative pressure through the Training Services Division of the

Manpower Services Commission or statutory Training Boards, are having much effect in the drive for an accepted terminology or readily accepted titles and roles. Comparisons between different titles or even between the similar titles in different organisations can only be meaningful if an in-depth analysis has been made of specific job content; otherwise we can only make an intelligent guess about areas of similarity or differences. This does not necessarily pre-empt the possibility of core of common denominator elements over a wide variety of titles and jobs as hypothesised in the OSTD (1979) and MSC (1978) documents, but it would appear to be more realistic to continually question our common denominator expectations.

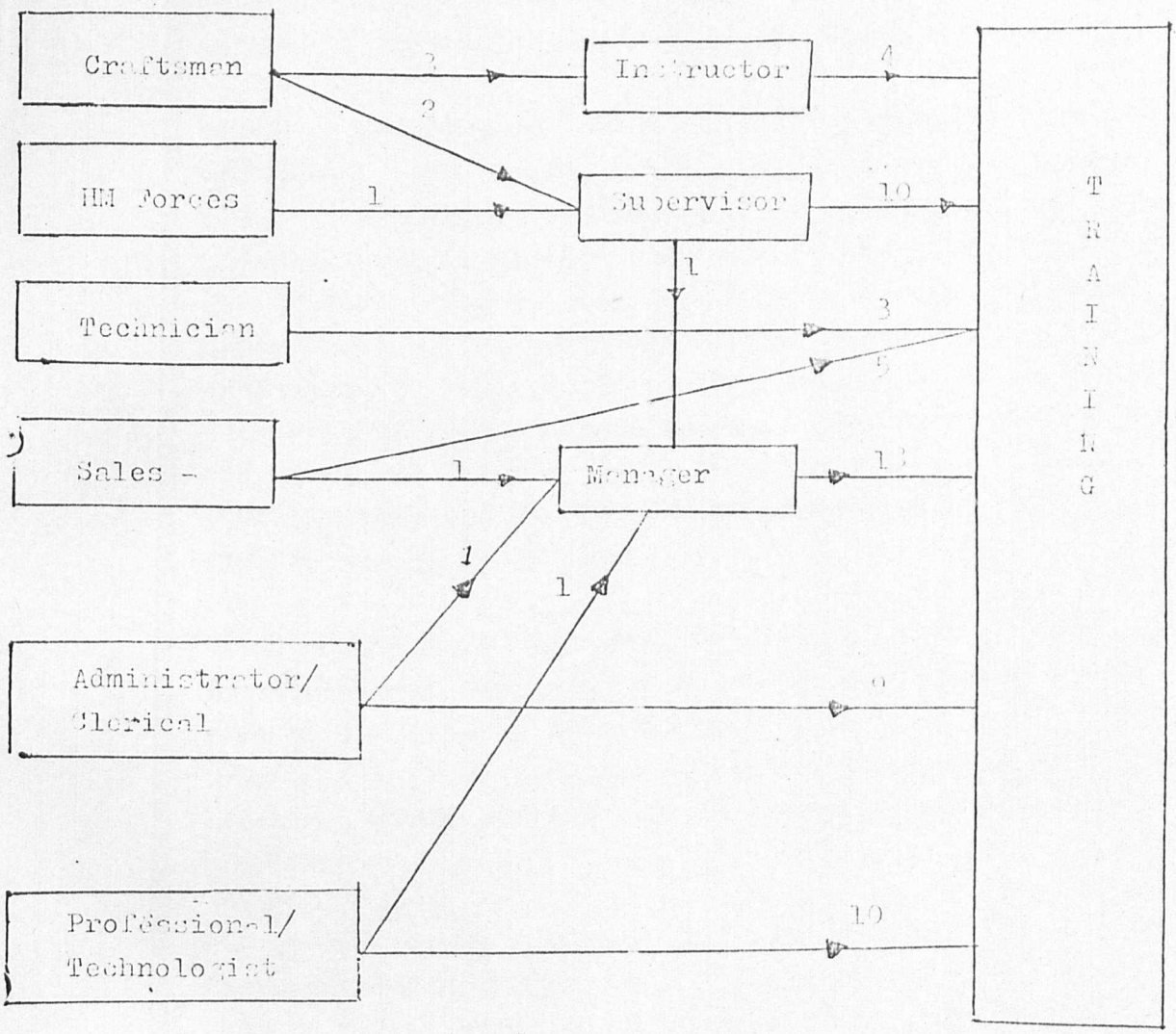
Routes into Training

This part of the section examines the sources of recruitment into the T.O. role from an examination of the three previous jobs held by respondents. It should be noted that the T.O.'s in the sample are all relatively new to the training function, with a maximum of five years in the role, since the sample was taken from course members who completed the introductory Training of Training Officers course from 1971 to 1976.

The importance of this question on the source of T.O. is that it not only points to an expectation of training from management - this has been borne out by the EITB research - but also relates to the potential areas of future development for the individual training officer. For example, if an employer initially recruits a T.O. to carry out operative or craft training, it is unlikely that the incumbent would be later acceptable in the boardroom to discuss the training of senior managers, even given that management would see this as a function or priority of training. There are obvious limitations in the argument that the source will tend to limit the function but there is evidence to suggest the obvious point that T.O.'s who have themselves

Fig I

Routes into Training



been in managerial positions will be more likely to be acceptable as management trainers: Rodger makes the point that senior training officers ("level 1") are "much more highly qualified than the sample as a whole, and much less likely to have undertaken an apprenticeship of any kind".

Figure 1 illustrates the sources of Training Officers in the study. The largest single group of T.O.'s emerged from the management classification: a total of 31% came directly from management into the training function with one training officer coming from each of the following categories: sales, administrator/clerical and professional/technologist. This result is fundamentally different from the Rodger's study carried out in 1966 where the most common experience of Private T.O.'s prior to taking up their training role was in the area of Supervision followed by instructing in HM forces.

The EITB study of 1973 showed a career path in which craft and technician jobs proved to be the most common source from which training officers were drawn: only 3% of full-time T.O.'s (n = 295) gave the position of Manager as their previous job as against 12% for technicians and 12% for craftsmen.

The present study possibly illustrates a trend away from the craft/technician/instructor sources of recruitment towards recruitment of employees with a managerial or professional/technologist background with a concomitant potential for the extension of the function at higher levels in the organisation. However, this view must be counterbalanced by the relatively high level input from Supervisory sources (17%) and the similar input from Administrator/Clerical positions: the latter source suggesting that there is still a considerable "paper" function within the training role and that a major function of some T.O.'s is still to 'protect' their employer by ensuring that the correct returns are being made rather than that the

most effective training policy and training activities are being undertaken at all levels within the organisation. It would appear that as long as there are returns to Training Boards on which levels of grants and exemptions are determined there will be a demand for administratively competent T.O.'s who will be measured by the over-simplified criterion of grant maximisation.

A further distinction that can be drawn from the present study in comparison with the Rodger's and EITB studies was the lack of recruitment directly from the personnel function, although some of the respondents had gone the other way and extended their training role to take over a broader human resource/personnel management function.

The personnel function was rated relatively high as a source of previous experience and a most useful preparation for the training function in the Rodger's study and was also considered to be the second 'most significant career route' in the EITB study. It could be argued that training can be seen as a natural extension of the human resource function and indeed Rodger et al have argued (1970) that training is one of a series of options for extending the utilisation of human resources within organisations. However, as Kenney, Donnelly and Reid (1979) point out, training is only likely to be effective as a sub-function of the personnel function if personnel is itself accepted as being competent and relevant in the context of the organisation: to subordinate training to a function which is viewed as having a purely welfare or administrative content, or merely as a low-level forum for recruitment, is to effectively jeopardise its potential by undermining its acceptability.

The use of the sales function as a recruitment source for T.O.'s (8% of sample) hopefully marks a trend towards the acceptance of the marked similarities that exist in a

comparison of the sales and training functions. While the sales and marketing functions are designed for (Hall (1976)): "the creation and satisfaction of customers", that of the T.O. is to help management design and structure a product (training) which will meet the present and future human resource needs of the organisation. Sales and marketing personnel can bring to the training function many of the tools which are necessary for the successful trainee: market research, creation and dissemination of products, product differentiation, cost-conscious product policies, evaluation of selling techniques.

There is a history of sales training in many organisations which pre-dates the establishment of an overall training function. This sales training activity tends to be based on the premise that organisations cannot send sales personnel out to customers without some basic product knowledge. But one factor which may distinguish the sales and training functions is the relative ease with which cost-benefit criteria can be applied to the former function: a requirement normally lacking in the application of training resources.

The results of this part of the study differs widely from both the EITB and Rodger et al studies in that the management route into training is the most common: in the other studies, particularly the Rodger's study, it provides relatively small numbers. Similarly, the route from instructors and HM forces is also poorly represented in this study while it figures as an important source in the other two studies. Possibly this arises from the tendency for organisations to view training as something which includes, but goes beyond, the basic traditional training requirements for operatives and apprentices to pay-off areas further up the organisation. Training board policies may also be affecting recruitment routes by their increasing demands for action and administrative evidence of management training. This increasing importance is also

reflected in the recent spate of training literature related to management training and development, particularly in the area of self-development, e.g. Manpower Services Commission (1977), Pedler et al (1978).

Organisation of Training

The function, status and acceptability of Training Officers may be reflected in, and influenced by, the ways in which they are organised and staffed. It was, therefore, felt necessary to examine this facet of the organisation of training to determine: (a) the extent to which respondents worked - independently or as a member of a training team, (b) whether they were full-time or part-time, (c) their responsibility for full-time or part-time administration staff and, (d) their non-training duties.

The majority (72%) of respondents worked independently within their organisations (table 12) with an apparent tendency for them to be more independent in smaller organisations, as could be expected, although there was some team membership in all firm sizes. But it is not possible to determine from the questionnaire whether the 'team' referred to was a training team, a team of human resource specialists, or a heterogeneous group of service and production personnel. The returns point to a majority of respondents working independently in their organisational environment but not necessarily isolated from it (page 53).

The sample comprised Training Officers who are predominantly full-time (78%) with the greatest single group of full-time Training Officers in the larger organisations (24%): the largest single grouping of part-time Training Officers appeared in the 300-599 firm size. This distinction between full and part-time Training Officers is not as straightforward as the terms may suggest as will be illustrated below when non-training activities are examined.

If, as has been argued (Rodger et al (1971)), there is the possibility of a relationship between the influence and status of Training Officers and the staff available to them, then the returns on respondents having administrative staff show a large minority (34%) of potentially under-utilised respondents without administrative support and only 48% having the services of full-time staff, suggesting that a number of respondents are engaged in uneconomic administrative activities. This is a relatively high percentage when compared with the Rodger et al study in which only 23% of Private Training Officers had no supporting administrative staff and the EITB survey in which a similar percentage operated without supporting staff. While the results of this part of the study may be acceptable in some contexts (see page 98) it appears to indicate the misuse of professional manpower on routine clerical functions.

Respondents' answers to the open-ended question on non-training duties elicited some surprising results: 38% of respondents had a responsibility for, and were actively involved in, the personnel function although only 24% had a Personnel prefix in their titles (page 42). A further 10% were involved in recruitment and selection: 10% also had the job of Safety Officer. When the figures are sub-divided to isolate non-training activities within the full-time and part-time categories, it emerged that three-quarters of the part-time Training Officers were either Personnel Officers or Personnel Managers or had a large area of responsibility in the personnel area and the remainder were involved in safety activities, e.g. as Safety Officers. The personnel function was also well represented among the full-time Training Officers: 28% of full-time Training Officers were directly involved in personnel activities and, if those with recruitment and selection responsibilities are included, the ratio increases to 40%. There were very few non-personnel roles included among the non-training duties of respondents: one mentioned O & M activities and another carried out job evaluation exercises while three were chairmen of Health and Safety Committees.

The results of this section of the survey indicate a sideways move among respondents, particularly part-time Training Officers, from a training function to one involving personnel roles. This job mobility could result from a series of factors: the expectations of both organisations and respondents may naturally extend to cover other human resource functions as respondents successfully establish and later maintain a function acceptable to management; organisations without the motivation, resources, or the 'know-how' to develop a personnel function may use, what they may consider to be, a legally established training function as a repository for organisational requirements for which there is no other convenient 'slot'; a move from the time-consuming establishment of a function to the point where it is largely self-running may motivate the Training Officer to search for other human resource development roles; the extension of industrial legislation (e.g. Health and Safety at Work Act) may not only generate an immediate statutory training responsibility but may also require a source of expertise and monitoring activities for which the initial source of the relevant training requirement - the Training Officer - would be the natural focus.

It would appear from the above that, while most of the sample apparently comprised full-time Training Officers working independently as trainers, there was a large movement towards the extension of the training function into that of personnel. Organisations in the sample are initiating their personnel functions from a training base and, therefore, the training roles examined in this study only cover a part of the function of the majority of respondents. The use of the term 'part-time Training Officer' could, in the absence of in-depth information on the content and relative importance of personnel roles, be a misnomer. A more accurate title may, in at least some instances, be that of full-time Personnel Officer or Personnel Manager with training responsibilities. Organisations may, by design or default, be increasingly viewing the training

function as a natural starting point for, or adjunct to, that of the wider area of human resource development and the statutory requirements which generated much of the current training may unwittingly be leading to a wider provision of integrated human resource management, albeit at a very basic level. It could be argued that this trend towards the extension of the trainees' roles could be justified from the Training Officers viewpoint by the need to have some control over the inputs into training by helping to ensure the trainability of inputs through the effective recruitment and selection of manpower. But the willingness of Training Officers to extend their roles upwards into the wider area of human resource management does not necessarily mean that this is a logical extension of either their training roles, which are essentially about extending job performance behaviour through training, or that they have the capacity to meet the requirements of more complex organisational behaviour requirements, although incumbents may in practice be 'experts' in the eyes of their colleagues. What appears to be emerging is a justification and support for the view of Rodger et al who illustrated a "hierarchy or continuum of roles" comprising: training administrator, instructor, learning specialist, training specialist and, finally, human resource specialist: but not necessarily a willingness to accept the possible limitations of personnel recruited for less demanding roles. The greater part of this sample would appear to be moving, if only by default, from the penultimate role of training specialist, toward the final role of human resource specialist: a role for which they have never been formally trained and which may, therefore, tend to be devoted in practice to the out-dated welfare orientation of the personnel function rather than that requiring a knowledge of, and competence in, the application of behavioural science techniques. There is no necessary relationship between competence in the much narrower specialisms of administration, instruction and training and the more complex function related to human resource development within the personnel function. What these findings do underline is the need to see training as

part of a broader human resource function and the need to ensure that this is reflected in the early training of those entering the training function. But it is important that we distinguish between these two functions: any attempt to train Training Officers as human resource specialists would change their expectations and roles away from training specialists into a job area requiring different skills and possibly a higher calibre entrant.

Reporting Levels of T.O.'s and Their Bosses

Reporting levels were examined in four contexts: (a) the reporting level of the T.O., (b) the reporting level of the T.O.'s boss, (c) changes in reporting levels of T.O.'s over a 1 year period and, (d) changes in reporting levels of T.O.'s over 3 years. Respondents were asked to indicate reporting levels on a format comprising seven categories: Director level, Senior Manager, Manager, Service Manager, Training Manager, Personnel Manager and Other.

A major consideration in the use of reporting levels is that it reflects the level of responsibility and acceptability of the T.O. within his organisation. It also illustrates the T.O.'s distance from his board of directors and possibly suggests the extent to which the T.O. has, or has not, the status of a professional in a position to influence policies and managerial decisions. Traditionally, (Brown (1963)), (Stevenson (1964)), it has been assumed that the training function has been subordinated to the personnel function, it lacked status and should, where possible, be related to the production function.

In both the Rodger et al (1971) and EITB (1973) studies there was a preponderance of bosses in the personnel function: 42% of respondents in the private sector of the former study and 61% in the latter study placed their function within the sphere of personnel management. But the Rodger et al study made the point, in the context of T.O. status, that

results "tend to contradict the assertion, frequently made, that the T.O. does not get near to the policy-making level in his organisation". The EITB, on the other hand, was less optimistic and complained that the heads of training departments "have a relatively low position in the organisation". The latest study done by the ASTD (1978) tends to support the Rodger et al conclusion by showing a high reporting level for practitioners with 61.4% of their large (2071) sample reporting to top-level management, corporate staff and division levels.

The reporting levels in the present research show a gratifyingly high level of reporting for T.O.'s, considering that the sample comprised new or fairly new T.O.'s, with 22.4% (13) reporting directly to board level and the single highest percentage of the six reporting categories reporting to senior management. The third highest percentage (25.5%) (15) report directly to a training manager and only one respondent reports to a personnel manager.

The majority (62.1%) of T.O.'s bosses report directly to board level with the next largest group (24.1%) reporting to senior managers: 5.2% report to Personnel Managers.

It was felt that an attempt should be made to gauge the extent to which reporting levels have moved by asking respondents to indicate the extent to which there have been changes in reporting levels (a) within the last year and, (b) within the last three years. The purpose of these questions was to attempt to get an indication of how, if at all, the job of T.O.'s were moving in terms of possible status enhancement as they developed the training function. Respondents were asked to state whether their reporting level had moved: (a) to a lower level, (b) same level or, (c) to a higher level, within the last year and within the last three years.

In the one year period 82.5% of respondents had remained at

a similar level throughout the year, 3.5% were at a lower level and 14% were at a higher reporting level within their organisation. However, over the longer period there was a greater move (29.1%) to higher reporting levels with 69.1% remaining in a static reporting position. This upward movement over the three year period could suggest a tendency on the part of the respondent's organisation to reward competence and acceptability by promoting T.O.'s to higher positions with possibly greater responsibility and status.

Upward mobility may also be due to such factors as: the reorganisation of management levels within the organisation, the upward drift of management-level personnel over time or fortuitious promotion related more to the acceptability of the incumbent than to either the competence of the T.O. or the ability of the organisation to utilise him effectively.

But even given the above constraints and that of the size of the overall sample (58) the results support both the Rodger et al and the ASTD studies in illustrating a T.O. relatively close to the board level of his organisation with the possibility of being able to relate to the policy-making level, or at least, senior management level, within the training function. The study also illustrates the possibility of a trend away from subordination to the Personnel function although this tendency to move away from the Personnel -dominated Training function may result from the narrow historical viewpoint of the Personnel function as low-level welfare activity concerned with canteens and recruitment. This has led to strain and hostility in situations where training is seen as being allied with, or subordinated to, a low-status personnel function (Hamblin (1966)).

The separation of the Personnel and training function may have a negative aspect as it could be argued (Training for Management of Human Resources (1972)) that where the Personnel department in an organisation is run effectively as a part of the human resource function it helps ensure the

coordination of human resource activities. Alternatively, where training is too closely tied to production it tends to be the first function to be depleted in adverse economic conditions or subordinated to the short term requirements of production.

Frequency and Usefulness of Contacts between the T.O. and Management

The considerable importance of relationships both among managers and between managers and those functions serving management is being viewed as an increasingly important factor for the effective running of organisations as a member of a work group. It is through his relationship with other members of the organisation that the T.O. determines his level of acceptance within organisational systems and it is from these contacts that he can equate his value systems as a trainer with those of both his peer group and managers within the organisation. Bucher (1970) argued that there are a series of factors determining the component parts of occupational identity among which the relationships between occupations and the actions thought to be the proper domain of job holders are major areas. It is through contacts with managers that these domains are established.

A study of the frequency and usefulness of contacts over a period of time helps extend our views of the T.O. as an individual operating within the social system of which he is a member and helps us enlarge our knowledge of the T.O. beyond the possible over-simplification of listed activities carried out within a hierarchical structure. Stewart (1975) underlined this relationship factor in her identification of managerial jobs in terms of a matrix of diverse relationships which, while being subject to conflict, nevertheless relies heavily on cooperation between job holders for success. A further reason for examining the frequency and usefulness of contacts that the T.O. has with his line manager is the need to compare the rather pessimistic material emanating from both the Rodger et al and the EITB researchers in the

context of managerial attitudes with those emanating from the current study. The unfavourable attitude of management to training was the most frequently mentioned snag in the Rodger et al study: "managers would not cooperate with the T.O., did not understand his role and were sometimes resistant to training". Since this situation was considered to be at the root of most of the T.O.'s problems it was rightly a matter of major concern. Similarly, in the EITB study although the theme of relationships was not specifically investigated the research pointed to a low-status T.O. lacking involvement and contact with management and seldom engaged in any type of human resource activities beyond the immediate task of training, generally at a low level within the organisation. However, the Bath University study (Frank (1975)) did not share this pessimism about the level and effectiveness of contacts at management level: 69% "disagreed", or "strongly disagreed" with the statement that "Management is indifferent and apathetic towards training". But just under half of the 326 sample "agreed" or "strongly agreed" with the statement that "the T.O. lacked authority and executive power".

The present study asked respondents three questions: (a) frequency of contact with their managers, (b) frequency of contact with their senior managers and, (c) whether they normally find their meetings with managers to be 'helpful', of 'little value' or 'frustrating'. The 'frequency of contact' questions were sub-divided into six headings: (a) monthly, (b) weekly, (c) daily, (d) irregular intervals, (e) seldom, (f) no contacts. While the answer to these questions would not indicate the type of contact, e.g. by telephone, face-to-face or written, it was felt that they would give an indication of the extent to which there was contact between the T.O. and his managers, on the understanding that the first step in any relationship is a willingness to contact and, hopefully, relate to the training function. It was not felt possible to get information on the content of these contacts since this would probably lead to a

profusion of data with which it would be difficult, if not impossible, to make a comparative analysis. A possible compromise was to tack a question on to the end of the 'frequency' question so that T.O.'s could make a broad, if subjective, qualitative response to the content of contacts with managers. Table 13 illustrates the frequency of contacts that T.O.'s had with their managers. The majority of T.O.'s (67%) had daily contact with managers, weekly contact accounted for 17% of the sample and 9% had contact at irregular intervals while only one respondent had contact at monthly intervals. In all, over 80% had contact with their managers on a daily or weekly basis. This tends to illustrate a relatively close and consistent level of contact although we have no direct evidence which suggests that the content of such contacts related to matters of moment in the training function or led to enlightened training activities on the part of management.

The T.O.'s frequency of contact with senior managers (Table 13) shows a greater spread of contact frequencies with a 40% daily contact and 26% weekly contact: 19% had contact at irregular intervals and only 7% at monthly intervals. As expected, the frequency of contact at senior management level is less than that for the T.O. - managers contact frequency. But there is still a considerable level of contact at this higher level, illustrating that while there can still be reason for doubt about effective accessibility to both managers and senior managers, there is a frequency of contact between T.O.'s and managers which was not apparent in the Rodger et al and EITB studies.

The function of the second series of questions on the level of cooperation between the T.O. and his managers and the T.O. and senior managers was to elicit information on the extent to which the T.O. found these contacts helpful or frustrating. It is generally agreed that training is essentially a service function although it can be argued with some justification (Taylor (1966)) that it is something

of an oversimplification to distinguish the line and service functions in organisation within the training context. However, the effectiveness of the T.O. will depend to a considerable degree on the support which he generates from management and no measure of technical competence in the manipulation of training techniques can compensate for negative management attitudes or an unwillingness on the part of management to cooperate with the training function. The T.O. achieves influence or power by his ability to generate support and the level of actual and potential support will be reflected in the quality of his relationships with managers and senior managers: the purveyors of resources.

The majority of T.O.'s (86%) (table 13a) found meetings with managers 'helpful', only 5.2% found them to be 'frustrating' and 8.8% got 'little value' from the exchanges. Training Officers illustrated a somewhat similar pattern with their senior managers with 79% of the sample finding meetings 'helpful' and 9% of 'little value'. But 12% of T.O.'s were frustrated with their meetings with senior managers as against 5.2% with managers. The reasons for these feelings of frustration help throw some light on the views that T.O.'s have of their expectations from managers and senior managers and how these expectations are reflected in the reactions of managers. The greatest single cause of frustration was the apparent inability of senior managers to establish clear objectives and take decisions on the basis of these decisions. There is an absence of any viewpoint concerning frustration generated through administrative loading or any sense of hostility from manager to the training function. However, 12% of respondents remain convinced that there is a lack of understanding of the aims and objectives of training at policy-making levels and, to a lesser extent, an absence of conviction about the worth of training.

The replies on frequency of meetings and levels of cooperation appear to reflect a function working effectively with management and largely free of the rejection symptons

illustrated in both the Rodger et al and EITB studies. The cycle of rejection, illustrated in Rodger et al, of management not believing in training, according it low status and depriving it of resources which in turn minimises training activity, is not borne out by the present study and the reasons for frustration could as easily relate to any other service function within an organisation (e.g. Work Study). This may suggest either an increasing awareness on the part of management of the functions and areas of competence to be expected from T.O.'s or an increasing awareness among T.O.'s of the limitations of training within their organisation and a resultant tendency to have more realistic expectations from their managers of what they can in reality be expected to achieve.

Attitudes and Expectations of T.O.'s and their Managers

While it is beyond the compass of this study to investigate the factors determining the attitudes of managers to training it was felt necessary to examine two facets relating to attitudes and expectations: (a) the respondents' perception of managements' attitudes to categories of training and, (b) the comparative expectations of respondents and their managers to areas considered central to the effective operation of training within organisations.

The respondent's perception of his immediate line manager's attitude to training was examined by appending a question on management's attitude to training in the matrix-structured question thirteen (part 7): respondents were asked to indicate their manager's attitude to training in each trainee category using a five-factor attitude scale spanning 'very cooperative' to 'hostile'. An attempt was also made to explore the extent to which management's attitude to training varied within each of the six firm groupings in order to investigate the existence of a relationship between management's attitude and size of organisation but no clear pattern emerged.

Response rates (table 14) varied considerably over the ten categories of trainee, the highest being in the craft/ operator category (98%) and the lowest at the director training level (29%). The average response rate over the ten categories was 60%, with supervisory (81%), manager (72%) and clerical (65%) categories having an above average response; senior managers (59%) and technicians (57%) were marginal and commercial (48%), graduate/professional (45%) and sales/marketing were below the average. The response rates from respondents on their perception of their managers attitudes to training follow closely the responses made to the categories of trainee which respondents administered and suggests a lack of contact with certain categories of trainee.

The levels of cooperation from managers perceived by respondents varied considerably between categories of trainees; the highest level of cooperation was attained in supervisory training where 57% were either 'very cooperative' or 'cooperative' but the average percentage over all categories, taking into account both of these levels of cooperation, was only 37%. The extent of variations in cooperation ('variable') differed between categories of trainees and was highest in the management, supervisory and clerical categories with an average of 19% over all categories. There was an almost complete lack of outright hostility to respondents from their managers although a large percentage (38%) of managers were 'uncooperative' in the training of craft/ operator trainees.

This examination of manager's attitudes to respondents in their training activities within specific categories of trainees illustrates wide variations in the extent to which respondents can expect stable and continuing support from their managers. The most common situation appears to be that in which manager's attitudes are likely to vary over time especially in the supervisory, management and craft/ operator categories. This situation could lead to difficulties

for T.O.'s, for example, an unwillingness on the part of managers to provide a stable environment during management training, which is almost by definition long term, could have severe repercussions in an area of training which is normally highly participative in content and largely depends for its success on the active cooperation at all levels of management. It may also be more difficult for the T.O. to operate in a situation where levels of cooperation are unpredictable and stressful: it could be argued that a continuing, consistent and unambiguous hostility may be difficult to live with but at least the incumbent knows where he stands in the esteem and expectations of his managers.

Less serious but still of importance are the implications of uncooperative attitudes by managers to craft and operator training. These attitudes may stem from a feeling on the part of managers that they are being excluded from these areas; particularly that of craft training, which is often highly formalised, costly, implemented apart from the work area and apparently unrelated, at least in the early stages, to the production function. Managers may therefore feel aggrieved at having to finance and resource craft training which necessarily has a long gestation period and possibly outcomes which relate more to generalised national requirements rather than specific, limited and immediate production needs.

However, the measure of cooperation perceived by respondents differed markedly from that found in earlier studies (Rodger et al (1971) and EITB (1973)) and possibly presages the increasing acceptance of training as a function having a contribution to make beyond the formalised traditional areas of craft, operator and supervisory training.

The second, and possibly more important, area of investigation was undertaken by using a Likert-type 5-point scale comprising a series of statements about fundamental issues in training from which it was hoped to explore three aspects

of the training function: (a) to what extent do respondents agree on key training issues, (b) what is the reaction of the respondent's manager to these key statements and, (c) to what extent, if any, are there similarities and differences between the viewpoint of respondents and their managers on these key issues.

Previous studies on the job of the T.O. have concentrated on the perceptions of the job holder and largely ignored the views and expectations of their managers. One possible reason for this situation is the very real difficulty involved in getting managers to diagnose and verbalise their expectations in a specialist area where even the professional participants have difficulty in agreeing on what is, and is not, basic to the function.

This difficulty in communication between T.O.'s and managers can be exemplified by comparing it with the transactions in a doctor/patient relationship. We can expect the patient (the manager) to be able to specify to the doctor (the T.O.) areas of the body (the organisation) comprising the ailment and describe the effects on him of his malady but it is only the doctor who can systematically analyse the symptoms, interpret the diagnosis and implement the treatment. This analogy helps pinpoint the difficulties involved in the determination of managerial expectations but has limitations in the training situation: there is no generally accepted body of knowledge in training; there are a wide variety of interpretations regarding norms of 'health' and 'malfunction' in individuals and organisations; training is being increasingly viewed as an activity which is done 'with' employees rather than 'for' them. However, it may be accepted as a general point of basic agreement that T.O.'s are, or should be, expert in the design and application of organisational learning requirements and as such should be in a position to advise the non-expert manager on learning while not usurping the manager's responsibility for training.

The main aim of this part of the study was to initiate an exploration of the degree of harmony or dissonance between the perceptions of respondents and those of their line managers by presenting them independently with a similar set of statements. The opportunity was also taken to gain the comparative views of respondents and their managers on a series of potentially contentious areas in which differences of viewpoint could have a fundamental effect on the content and acceptability of the training function.

These statements were compiled on the assumption that there are a series of basic requirements, generally accepted in training literature, which must be agreed and fulfilled before training can be effectively implemented within an organisation. For example, the acceptance by both the T.O. and management that training is essentially about improving job performance (table 15, question A) and that management have a responsibility for both writing and implementing their training policy.

Statements were also inserted (e.g. C and F) to attempt to determine how the manager viewed the training function in the context of participative relationship and to gain insight into the extent to which managers accept their function as practising trainers (B and I).

The difficulties and limitations of using such a series of 'dip stick' statements are considerable: the problem of striking a balance between aemantic complexity and facile over-simplification; the tendency of respondents to err on the side of righteousness rather than realism; the possibility of wide variations between both T.O.'s and managers as to what is, and is not, basic to the training.

1. The T.O.'s attitudes and expectations (Table 15)

There were three major areas of agreement ('strongly agree' or 'agree') among T.O. respondents: (a) the need to relate

training to job performance (94%), (b) the need for the active participation of managers in training activities (94%) and, (c) managers responsibility for the training of their subordinates (98%). There was also strong support ('strongly agree' or 'agree') for: the need to evaluate training (85%), the function of the T.O. as a participant in organisational change (82%) and the (not unsurprising but by no means unanimous (79%)) view that their organisation would be less effective without a T.O. The vulnerability of the training function in times of economic downturns was underlined by the measure of strong agreement, or agreement, on the pressure placed on training budgets during a recession (77%) although 10% of T.O. respondents were uncertain about this relationship and 13% disagreed. Doubts were placed on the effectiveness of the working relationship between the training function and those of production and service functions: 24% of respondents 'strongly agreed' that there was an effective relationship and 48% agreed with this viewpoint but 17% were uncertain and 8% disagreed.

The main areas of uncertainty and doubt among respondents were those relating to the contribution of training boards with 32% of respondents being uncertain and a further 30% disagreeing with the statement that training boards make a positive contribution to training requirements. But it could be argued that the relative inexperience of respondents may have biased them against training boards. There was also a considerable degree of ambivalence about the function of T.O.'s as course runners: only 8% strongly agreed that course running is not a major function of the T.O. and a further 51% agreed with this statement; 8% were uncertain and 25% disagreed, with 8% strongly disagreeing. Differences also emerged on the value of training meetings (with a 33% uncertainty rate) and on the activity of senior management writing training policies: 22% of respondents disagreed with the view that senior managers should write training policies and 10% were uncertain.

While most of the reactions to statements reflect the conventional wisdom on the training function there were several important factors which stood out. Respondents were by no means unanimous about their traditional role as staff who design and run courses as a major activity: a small minority reject this course orientation viewpoint but there exists a considerable degree of uncertainty and strong reaction in this area. This suggests the possibility of a number of respondents having the expectation of utilising a large part of their resources to carry out training in a formal teaching context to groups of employees in areas physically separate from the learning environment of the organisation. The existence of equal and opposite reactions to statement 'B' suggests strongly held views at the extremes with a large measure of uncertainty in the middle ground.

There is also a wide disparity in the extent to which training meetings are found to be helpful which suggests that devices used to open and extend lines of communication may generate problems as well as present opportunities for mutual participation: the committee solution to training problems can be a double-edged sword.

The extent of the uncertainty among respondents on the question of who should write the organisation's training policy suggests the existence of T.O.'s who, without expectations of consultation and in opposition to Training Board policy guidelines (e.g. Clothing and Allied Products (1977)), present their senior management with policy decisions on training which do not necessarily reflect or harmonise with organisational objectives (Tavernier (1971)). The obvious danger likely to stem from this situation is the potential detachment of training from ongoing and projected management policies with a resultant cynicism on the part of the T.O. and the disenchantment of senior management with imposed and apparently irrelevant training activities. The situation in which the T.O. writes the

training policy may also result from a default on the part of senior managers who may be either unable or unwilling to define expectations or coordinate and promulgate policies.

2. The Managers Attitudes and Expectations (Table 16)

There were only two areas in which a majority of managers expressed strong agreement and both of these were just over the 50% level and related to the need for managers participation in training (58%) and the responsibility of managers for the training of their subordinates (55%). But if the percentages strongly agreeing are added to those in the 'agree' column then there are six statements which a large majority of managers support. These are as follows: (i) training is about 'improved' job performance (100%); (ii) training requires the active participation of managers (100%); (iii) managers are still responsible for the training of their subordinates (94%); (iv) the organisation would be less effective without a T.O. (94%); (v) evaluation is essential to ensure the correct utilisation of training resources (94%) and, (vi) there is an effective working relationship between the training and the production and service functions (87%).

The main areas of uncertainty are: those relating to the helpfulness of meeting (29%); the extent to which Training Boards make a positive contribution to an organisation's training requirement (23%) and the importance of a T.O. as a course runner (20%).

If the percentage who 'disagree' are added to those who 'strongly disagree' then four main areas of disagreement emerge: (i) running of courses as a major function of the T.O. (40%); (ii) the contribution of Training Boards to organisational requirements (29%); (iii) the vulnerability of training budgets during periods of financial constraint (20%) and, (iv) the need for senior managers to write the training policy (25%). There is only one statement which

arouses strong disagreement and that is the function of the T.O. as a course runner: 13% of managers strongly disagreed that running courses is not a major function of the T.O.

Encouraging factors emerging from the managers' responses were the very strong support for training as an activity which increases organisational effectiveness and the apparent support for participation in the training activities of subordinates.

There was also a realisation of the need to evaluate training activities in order to ensure effective resource allocation.

However, there was a considerable degree of uncertainty and disagreement among responding managers in what are often accepted as areas of assumed agreement. The greatest single area of uncertainty and disagreement is in the area of course running where 50% of respondents were either uncertain or disagreed on the importance of this function. A majority of this dissenting group appeared to view the course-running function of the T.O. as central to his training activities and presumably have something akin to a teacher/pupil attitude to training at a time when both the Training Boards and educationalists are moving towards job-related self development and team-building.

A further area of uncertainty and disagreement which will have an important effect on the function and acceptability of the T.O. is that of who should write the training policy. This disagreement suggests that a large minority of responding managers view the T.O. as possibly the only person within the organisation capable of determining, and interpreting, major policy requirements in the field of training or alternatively view such decisions as peripheral to organisational requirements and therefore capable of delegation (or abdiction) to specialists.

A slight majority (52%) of managers were also uncertain or disagreed with the view that Training Boards make a contribution to their training requirements, apparently illustrating the continuing, if decreasing, resistance of some managers to the concept of, what they considered to be, governmental influence in their organisation. While there is both uncertainty and disagreement on who should write the training policy there is very little strong disagreement but the point is made that Training Boards and their staff are far from the goal of acceptance sixteen years after the passing of the 1964 Act.

3. Comparison of T.O.'s and Managers Attitudes and Expectations

Assuming that there was no collusion between respondents and their managers, there was a remarkable measure of agreement in the reaction to the statements presented separately to T.O.'s and their managers. This congruency in viewpoint was high both in statements with which respondents agree and disagree so that movements from generally accepted expectations in training tend to be shared by respondent T.O.'s and their managers. For example, the reactions, already noted, to the function of the T.O. as a course runner, illustrate differences of viewpoint in both groups.

One area in which there was an unexpected measure of disagreement between the T.O.'s and their managers was that of the T.O.'s contribution to the effectiveness of the organisation: T.O.'s were much less certain about the usefulness of their function to the organisation than their managers. This may result from the introspective pressures which are a necessary part of a function conscious of the need for the continual evaluation of its activities and often unable to implement roles central to its value system. It could also be argued that T.O.'s were likely to be more sensitive to the gap between the activities they perform, or were permitted to perform, and the rigorous training and evaluation models such as that of Annette (1968), Warr et al

(1970) and Hamblin (1974) which may form part of their professional expectations.

SECTION 4

TRAINING ROLES

Areas of Concern

Section 3 traced the development of training roles and the attempts made to establish a series of basic roles considered necessary for all personnel operating in the training field. The sources of these attempts at rationalisation varied widely but may be conveniently sub-divided into three broad but not mutually exclusive types: (i) expectations derived from practical experience in training activities; (ii) those of academics and professional bodies who have examined the nature of the Training Officer's job and have defined the present and future expectations in terms of requirements necessary to initiate and develop learning situations within organisations by using a behavioural science orientation; (iii) government agencies attempting to develop training as an integral part of manpower strategies by prescribing activities and standards. The common denominator in all these differing groups is the belief, stated, implied or assumed, that there is a core of role requirements which may differ in application according to a whole series of variables, such as technology, acceptability, size, but which nevertheless distinguishes the job of the Training Officer from other manpower-orientated functions.

The first part of this section examines the viability of this core concept by comparing the expectations as perceived by respondents with those emerging from the studies reported in the previous section in an attempt to contribute to the debate on what a Training Officer does with the specific aim of determining subsequent training requirements.

The second part of the section extends this examination of roles by considering four main questions: (i) is there a relationship between firm size and training roles? (ii) what

were the role changes of respondents over a period of time? (iii) what were the difficult and time consuming roles? (iv) what were the role expectations of respondents and what do they perceive as their areas of impact?

(i) Relationship between firm size and roles. Roles were examined and compared in an attempt to establish a pattern of roles related to size. A comparison was also made between roles considered to be essential to the training function, for example, assessment, job analysis, programme design and evaluation, and those actually carried out by respondents.

(ii) Role changes over time. The main concern in this context was that of attempting to discern the existence of consistent patterns of change over a span of time and, if possible, trying to extricate role movements in terms of upward mobility through a hierarchy of roles (e.g. from craft to supervisory or management training). To what extent was role mobility practised? Was it upward or lateral and was there a trend to move from training roles into those considered to be the domain of the personnel or human resource specialist? Were administrative roles changing through time and was there a difference in administrative roles between the different firm size groupings?

(iii) Difficult, time consuming and key areas. It could be argued that the training of T.O.'s should be concentrated not only in areas where a general consensus of need for competence is accepted but also in those roles which Training Officers find difficult to perform. The nature of these difficulties can then be isolated and analysed with a view to the development of training or other strategies. Is there a relationship between difficult and time consuming roles? Do Training Boards pose problems for respondents and are their requirements judged to be time consuming? The exploration of key areas as perceived by respondents was undertaken in an attempt to establish a comparison between areas generally considered to be central to the effectiveness of the training function in Section 3 and those actually perceived as such by practitioners.

While it is obvious that the subjective perceptions of a relatively small sample (n = 58) of T.O.'s will not provide sufficient grounds for the development of objective criteria they nevertheless present facets of actual training situations in which the expected key areas derived from Section 3 can be compared with those emanating from practitioners attempting to identify and meet the needs of their firms. The isolation and analysis of difficult, time consuming and key areas may also serve as a useful indicator of the extent to which current training programmes for T.O.'s are meeting the perceived key areas of practitioners.

(iv) Role expectations and areas of impact. This part examines the extent to which respondents are fulfilling the roles they expected to fulfil and seeks to answer two questions: (a) what were the expectations as perceived by respondents? and, (b) to what extent were they fulfilled or unfulfilled? The importance of these answers to the trainers of T.O.'s is twofold. First, it helps isolate expectations generated in the initial training period which may subsequently have proved to be unrealistic and which may have led to a conflict of expectations between the respondent and his manager. Second, it will help the trainers of T.O.'s to identify the nature of these gaps and possibly lead to the questioning of broad expectations which in turn may lead to their discontinuation or change. Respondents were also asked to state the areas in which they felt they should be making an impact but were failing to do so. This again may help us distinguish and define potential areas of support required by practitioners and so contribute to the training requirements for both new entrants and those currently carrying out training.

Common Roles

This part of the section examines the concept of common roles and makes comparisons between the common roles emerging from this research and those of other researches in an attempt to determine the extent to which it is possible to isolate roles

likely to be a requirement of all Training Officers.

No respondent carried out all, or even most, of the 62 roles listed in the questionnaire. The average number of roles carried out was 34 without any discernible pattern emerging between firm sizes: the lowest role numbers (28) were in the 300-599 and 2000+ firm groupings and the highest (44) was in the 1500-1999 grouping. Respondents' jobs therefore illustrated a large measure of variety in the number of roles carried out by individual respondents. These findings on role coverage broadly coincide with those of the Rodger et al (1971) study in which Private Training Officers covered on average 28 job items out of a total of 42 although their findings showed a wider span of coverage over a smaller number of job items: 42 as against 62. It was not possible to make a similar comparison with other researchers as they did not isolate numbers of roles covered by individual respondents.

A top twenty listing of roles carried out by respondents in the 'all firm' grouping over the last year (table 17) illustrates wide variations in roles covered by respondents. There was no single role within the 62 roles offered which was covered by all respondents: the highest level of support (83%) was for 'Working with management' and the lowest, at 7%, was 'using simulators'. This broad span of support is illustrated in the percentage gap between the top and bottom roles in the top twenty grouping: 83% and 53% ('instructing').

The second most common role, with a 78% response, was 'administration of training' which is not necessarily a training role and could comprise clerical or form-filling activities, while the third role was that of 'telephoning', again not strictly a role requiring training skills. 'Developing training contacts' both externally (74%) and internally (69%) had a relatively high rating and suggests a need to establish contacts particularly with educational organisations which was also included in the top twenty roles with a 64% rating. The

administration of external courses (47%) was not included in the top twenty. The role of 'selling training to managers' is also relatively well supported with about three-quarters of respondents supporting it.

It is only when we go marginally below the three-quarter coverage that the traditional and commonly assumed areas of the training begin to emerge: 'preparing training programmes' (72%), 'identifying training needs' (71%). The other two commonly accepted basic roles of 'job training analysis' and 'evaluation' do not appear in the top twenty: 'job training analysis' had a 33% response rate and 'evaluation', 48%. There was much more for the non-training role of 'recruitment and selection' (57%), while the traditional role of the trainer as a person who actively trains, instructs or lectures was only supported by just over half of the sample ('instructing' 53%, 'lecturing' 53%).

The newer role expectations of the Training Officer as a person concerned with 'assisting in the development of organisational change' and acceptable to colleagues as a 'counsellor' found support in just over half of the respondents (57% and 53% respectively).

The bottom 10 roles contained some surprises: only about a quarter of the respondents were concerned with maximising a grant, getting training staff and placing trainees. Few respondents were involved in 'psychological testing' (10%) possibly due to a realisation of the complex nature of such testing and the difficulties which can arise when it is carried out without professional guidance. Roles related to organisational development also had a relatively low rating: using interactive techniques had a 24% response rate and 'applying OD techniques' a 14% response.

Several important areas of agreement and some differences emerge when these findings are compared with previous researches,

publications on training roles and those of professional and government agencies. The present research supports the point made in the Rodger et al (1971) research that a large number of Training Officers are not involved in direct training activities and appears to support the view that the main function of the trainer is the 'selling' of training and getting training to happen by helping to create a learning environment. A factor which emerges strongly from both studies is that Training Officers have unqiue patterns of job activities and that there is no highly specific type of Training Officer.

The results of the returns on administration differ from those of the Rodger et al (1971) study in that the present survey is less pessimistic on the misuse of Training Officers in the administration of training, the difficulty of obtaining training resources and the concern about the undue amount of time spent in meeting the requirements of Training Boards. These three factors are examined in greater detail later in this section.

It is difficult to make a straight comparison between the findings of this survey and that of the EITB since their 14 job items comprised a series of broad role groupings (table 1) but there was agreement on the finding that no respondent covered all the listed items. One item which lacks support in both researches but is well supported (72%) in the Rodger et al (1971) research is that of costing. The concern which Odiorne (1970) and Talbot and Ellis (1969) underlined on the economic justifications and detailed costing requirements are largely ignored in the training activities of respondents to both the EITB (1973) and the present researches. However, the EITB study shares the pessimism of the Rodger et al study on the amount of energy dissipated by Training Officers in the meeting of Training Board requirements in contradistinction with the present study.

The somewhat conservative viewpoint of other Training Boards

(page 213) were not fully supported by respondents but areas of agreement included the levels of support given to determining training needs, running training programmes and the importance of an effective working relationship with management. Important divergences exist in the expectations of Training Board on the function of the Training Officer as a person who prepares job training analysis, structures training objectives and, in the case of the Local Government Training Board, carries out instructional activities.

The following is a listing of the main role areas or job items emerging from an examination and interpretation of researches into the Training Officers job made in the Rodger et al (1971) study, the EITB (1973) (table 1) survey, the ASTD study (table 2) of professional training and development roles (table 2) and the present study. The interpretation of the practitioner perceptions in these researches was difficult to collate for two main reasons: (i) various terms were used to denote role areas or job items (e.g. 'identify training needs', 'identify training and development needs through interviews or informal discussions') and, (ii) omnibus terms were used, notably in the EITB 14 job item listings, and as a means of clarifying items in the ASTD study. It follows from the above and the points made on page 24 that this table must be used with considerable caution particularly as it is based on quantitatively gauged support rather than qualitative considerations. These latter factors are examined later in this section and in subsequent sections.

Common Role Areas

1. Working with Management.
2. 'Selling' training to Management.
3. Identifying training needs.
4. Preparing training programmes.
5. Administration of training.
6. Developing training contacts.
7. Recruiting and selecting trainees.

8. Liaising with educational organisations.
9. Advising on the training implications of legislation.

The above roles were well supported in all studies.

10. Conducting training sessions. Well supported in Rodger et al and ASTD studies and apparently in the EITB study but less popular in the present research.

11. Budgeting and Costing of training. Marginally supported in Rodger et al and in top 25 of ASTD items but lower rating in EITB and present study.

12. Writing training reports. Well supported in Rodger et al and present study, not specifically mentioned in top 25 of ASTD study. Absent from EITB survey items.

13. Use of training techniques. Considerable support in ASTD study but less so in other studies.

14. Counselling. High on ASTD listing, marginal, but increasing in use, in present study.

15. Establishing training objectives. Well supported in ASTD study. Part of highly rates grouping in EITB survey. Low in present study and not listed in Rodger et al research.

16. Evaluation of training. Low on ASTD top 25 items. High on Rodger et al listing ('gathering evidence of the value of your training schemes'). Low on EITB and present studies.

Areas of Low Rating

1. Using simulators. Low on all studies in which it was used.

2. Applying P.I. techniques. As above: last item in bottom 25 of ASTD study.

3. Applying OD techniques. Low on ASTD items and present study. Not measured in EITB and Rodger et al studies.

4. Job training analysis. Low on all studies with the exception of the ASTD study but has a low listing on their top 25 items.

The most striking finding which emerges from this examination and comparison of training roles is the relative lack of uniquivical support for what was considered in section 3 to be the essential activities for the practising T.O. The most obvious example of these deficiencies being the low ratings for the job training analysis and evaluation. How is it possible to 'prepare training programmes' without some form of job training analysis? Can it be accepted that training programmes are designed and implemented without some form of validation or evaluation? The answer to these questions would appear to be determined by the ways in which practitioners define these terms: the results of researches would appear to indicate that Training Officers only feel that they are carrying out an activity if it fits the often complex expectations of the writers on training illustrated in Section 3. The reality is that every job has to be analysed, no matter how superficially, before a training programme can be designed and implemented and every programme is validated or evaluated, no matter how subjectively.

A further factor which must be considered is that this part of the Section has been concerned with a quantitative comparison of roles. But numerical ascendancy does not necessarily imply legitimacy or that the gap between what is expected and what appears to happen necessarily points to an unrealistic expectation on the part of writers on training, professional organisations and government agencies. It is the function of these groups to extend the potential of training and to introduce and encourage innovation. But an important requirement in this context is to ensure that value judgements and hypotheses on the nature and potential of training do not generate expectations

which practitioners may find impossible to sustain in a performance-orientated business environment.

The major contribution of these quantitative findings is that they indicate the ways in which practitioners perceive their activities and supply a rough, if limited, benchmark showing what appears to be happening and in so doing helps us gauge the gap between what we consider should be the proper functions of T.O.'s and how the practitioners interpret their jobs. The common roles which emerged are only one part of complex job situations which we will now examine in the organisational content in an attempt to widen perceptions and, to a limited extent, isolate role determinants as a precursor to the establishment of training requirements.

Role Areas in Relation to the Size of Firm

This section compares role areas undertaken over a one year period as perceived by respondents within the six groupings of firms in an attempt to establish the extent to which there is a relationship between the size of a firm and the role of T.O. The number of firms within each group will limit the extent to which it is feasible to extrapolate the findings to T.O.'s in general but broad trends may be suggested, particularly between the largest firm grouping (2000+) and the smaller firm. Role areas are listed to form a top twenty and a bottom ten in each group (Tables 17 to 23) and correlations calculated between the 'all firms' category and each firm grouping (Table 31).

The first finding which appears to emerge from this inter-firm size comparison is the relatively high levels of agreement within each grouping on the top ten roles. The top ten items in the 100-299 group (Table 18) goes from 100% to a low of 87%; the 600-999 group (Table 20) to a low of 81% - this group also contains four role areas in which there is 100% agreement - the 1000-1499 group (Table 21) has a low of 70% in the top ten roles and the 1500-1999 group (Table 22) has a low of 83%. The only firm size which contradicts this trend is that of the

300-599 group (Table 19) in which the lower role percentage in the top ten is 66% but even this is above the low of 56% in the 2000+ firm grouping (Table 23).

Differences also appear between the largest and smaller firm groupings in response levels between roles.

The 2000+ group have a much lower response level in the 'working with management' role due possibly to the tendency among some larger organisations to view training as a separate, independent, function while in the small firms there is less room for compartmentalisation, although this is not necessarily a guarantee of either effective relationships or performance-related training. Similarly, 'administration of training' has a consistently high rating among all groups with the exception of the 2000+ group. One possible reason for this important difference is the availability of a clerical support for T.O.'s in larger firms which allows this generally unpopular area to be delegated as a secondary function. The Training Officer in the larger firm is also less likely to be involved in the development of external training contacts than his colleagues in smaller firms possibly due to a measure of independence gained from size and the availability of a wide spectrum of expertise. The Training Officer in the smaller firm is obviously more isolated and would naturally tend to extend his competency by contacts with other Training Officers in other firms.

The development of contacts both internal and external is a consistently high percentage role area in all but the largest firm grouping. 'Selling training to management' rates higher in the top four groups of firms (Tables 20, 21, 23) and is at the top rating in the 2000+ and absent from the top 20 in the smallest group (Table 17). This may be due to the proximity of the T.O. in the smaller organisation to his top managers and the assumption that management accepts the views of its T.O., or less sanguinely, that the T.O. in the smaller group simply lacks the confidence or the expertise to attempt to 'sell' his function and that training activities languish at lower levels

within the organisation.

The activity of preparing training programmes is an obvious and common activity in all groups but is remarkable for the variations in response to what is normally considered to be a central role within the training function: the 2000+ group have the smallest percentage return in this role. Possibly respondents only consider that they are only performing this function if it results in a highly structured, formalised, layout of the type that is traditionally associated with the training of workers in repetitive, short cycle, manual operations. A further possibility is that respondents, particularly those in large firms, simply accept and apply the training programmes designed and structured by training and educational organisations such as training boards, training consultants and course-running establishments.

The other major role which it is normally assumed that all T.O.'s perform is that of identifying training needs. The actual levels of response of these 58 practitioners varied and there was no apparent pattern between firms of different sizes with the exception that it was absent from the 2000+ group top twenty and present in every other top twenty.

But the 2000+ group did contain a relatively high rating for 'assisting in the identification of training needs' which is possibly to be expected in larger organisations where training is more likely to be seen as one of a series of service functions contributing to, and assisting in, the determination of training needs rather than the sole identifier of these needs and, possibly by default, their arbriter. A large proportion of T.O.'s (75%) in the smallest group had this assisting role as part of their function but it was at a lower level than 'identifying training needs' which had an 87% response rate.

The desire of T.O.'s to keep up with training literature was relatively popular in all groupings with the exception of the

2000+ group where it was not included in the top 20. This is not specifically a training role since it could be argued that all specialists will seek to follow developments in their own field. This difference in interest could possibly be explained by the greater opportunities likely to be offered to T.O.'s in larger firms to attend courses and conferences both within the firm and outside it and also the fact that T.O.'s in larger firms are likely to have banks of expertise which T.O.'s in smaller firms can only attain and maintain by a continual literature search.

The relationship between T.O.'s and educational organisation was a relatively constant role requirement for the larger majority of T.O.'s in all groups of firms: the only exception to this situation was that of the 2000+ firms where it was missing from the top 20. The liaison function also varied in the context of relationships between T.O.'s and their training boards. This role area was only high (87%) in the smallest grouping, missing from the two top firm groupings of firms and included in the top 20 of the three remaining groups.

The instructional/teaching aspects of the T.O.'s job varied considerably between firm groupings. 'Formal lecturing' is only mentioned in the top 20 of one group (2000+), 'using visual aids' varies as a role requirement and is included in the top 20 of the two largest groups but not the bottom two groups. Similarly, 'instructing' is by no means a constant role area: it is excluded from the top 20 roles of the three smallest groups but appears marginally (50%) in the fourth group and is absent from the fifth group, reappearing as a marginal (56%) activity in the largest group.

A role which is generally accepted as central to the programme design and instructional functions is also conspicuous if not by its absence then by the mixed support which it achieves from respondents, namely, 'writing training objectives'. While this role has a high rating in the smallest group and the second largest firm grouping (75% and 83% respectively) it does not

appear in the top 20 of the other four groups. This becomes even more difficult to understand when the role of 'preparing training programmes' appears in every set of top 20 roles although the level of support varies from a high of 100% in the 600-999 group to 56% in the 2000+ firm grouping.

The T.O.'s role in recruitment and selection tends to be more popular in smaller firms: this role is only mentioned in the top 20 of the three smallest groups of firms. One possible reason for this situation is that larger organisations are likely to have recruitment and selection specialists or a personnel function which performs this function. Although it could be argued that a T.O. cannot perform effectively unless he has some connection with recruitment and selection procedures.

The role area of 'assisting in the development of organisational change' has been viewed as a legitimate role area for the T.O. who sees his job as an integral part of the function within the organisation. However, this role is only mentioned in the top 20 of the largest group of firms but an examination of the way in which the acceptance of this role area is developing will be made below.

There are a series of role areas which only appear marginally in the 2000+ top 20. These are as follows: 'evaluating training (56%), 'structuring training budgets' (50%), 'using training budgets' (42%), 'getting training equipment' (42%) and 'writing training policy' (42%). Conversely, there are role areas in the 100-299 group of firms which do not appear in the top 20 groupings of other firms. Among the most popular role areas in this inter-group distinction are those of 'writing training objectives' (75%) and 'assessing performance of trainees' (75%). 'Assessing future manpower requirements' is strongly represented (75%) in the 100-299 group of firms and in the 300-599 group (77%) but is absent from every other group.

There also emerged a few roles which have not been traditionally viewed as T.O. roles: 'Counselling' appears in two groups:

600-999 (72%) and 1500-1999 (83%). 'Working with T.U's also appears in two groups: 1500-1999 (83%) and 300-599 (55%).

There is no single role which appears in all the bottom ten items listed. However, there are a series of roles which are mentioned in most firms' bottom 10 groupings. These are as follows:

using simulators
applying P.I. techniques
psychological testing
applying O.D. techniques
liaising with YEO

'Job training analysis' is mentioned in the bottom 10 of two groups (300-599, 2000+), underlining the considerable distinction between the 'ought' of what it is generally believed T.O.'s do in their job roles as against the 'actual' of the roles they carry out.

Several interesting features emerge from the comparison of top 20 training roles of smaller firms as against the top 20 roles performed by T.O.'s in larger firms; some of which are obvious and others less so. The measure of agreement on role areas is much greater in the smaller firms going from 87% (liaising with training board staff), to 62%, 'preparing training programmes'. This compares with a top role coverage of 78% ('selling training to management') declining to a low of 42% ('getting training equipment'). Areas of similarity between the functions of T.O.'s in large and small firms include 'administration of training' which is top of the list with 77% in the 300-599 organisation, joint second (87%) in the smallest group (100-299) and joint fourth (56%) in the largest firms (2000+). 'Working with management'also ranks high in all groups as does 'assisting in the identification of training needs' and 'identifying training needs' although the latter ranks much higher (87%) in the smallest firm while the former is higher (63%) in the larger firms. 'Developing training contacts' is also included in both listings, as does 'administering courses', but the former has a higher listing in the smaller firms: 75% against 50%.

Differences appear in the factors which by definition could be

expected between training activities in large and small firms. For example, travelling between sites (56%) could be expected in larger firms. But a surprising difference is the absence of any contact with Training Boards by a large minority of T.O.'s in the smallest firm grouping.

The role differences between different firm sizes were cross-checked by using the Spearman Correlation (Table 31). The top 20 in the 'all firms' (1 year) category was compared with the top 20 in each of the groups. This showed a reasonable level of correlation between the 'all firms' category and each individual firm grouping with the highest correlation (0.8275) existing between all firms and 600-999 firm group. The lowest correlation (0.6936) was between the all firms group and the 1500-1999 group. It would appear from this that while many of the role areas, for example 'evaluation' and 'job training analysis', do not get the support they ought to get, and the accentuation on role varies between groupings based on size, there is a relatively high correlation between role areas in differing sizes of firm. What is not apparent is the existence of a pattern of roles clearly related to the size of a firm although there is a hint of certain role areas which are more likely to be found in larger firms and vice versa.

Roles: Changes Over 3 Years

This section examines the ways in which the roles of T.O.'s have changed over a three year period. Respondents were asked to tick the roles they had performed over a three year period and those they performed over the last year. It was hoped to be able to indicate the way in which T.O.'s roles changed over time as they worked within their organisation. Role movements are examined by comparing the top 20 and bottom 10 roles areas within all firms between the one and three year period and by making a similar comparison within groups of firms (100-299, 300-599, 600-999, 1000-1499, 1500-1999 and 2000+), (Tables 24 to 30.)

1. All Firms

The top 20 roles (Table 24) undertaken over the one year period illustrate a T.O. carrying out the functions which are generally considered to be the remit of the traditional T.O: 'working with management' tops the list and includes 83% of respondents. The list also reinforces the view that the T.O. tends to see himself as an administrator of training rather than a person who actually carries out the training although 'formal lecturing' and 'instructing' are listed, albeit lower on the list. The top factors also underline the importance which the T.O. places on the 'selling' aspect of training and that of developing training contacts externally. While 'telephoning' has a high listing (76%) it could nevertheless be argued that this is an essential part of any service function.

A comparison of the roles over one year with those over a three year span (Tables 17 and 24) illustrates a marginal increase in the 'working with management' role and the inclusion of 'counselling' as a function with the disappearance of the T.O.'s function as a training board administrator: no mention is made of 'making grant claims' in the one year top 20 roles, although 'liaising with training board staff' is included in both sets of top 20 roles. Possibly suggesting a tendency for the T.O. to use the training boards more as a consultancy and advisory base and less as a grant maximising agency.

A comparison of the tables also shows some surprising exclusions: while 'writing training objectives' is included in the roles carried out over a three year period it is absent from the one year top 20. The traditional 'ought' expectations of 'evaluation' and 'job training analyses' are also conspicuous by their absence: the latter role is included in the bottom 10 list of the three year span. These exclusions raise fundamental questions for the training profession and for those responsible for the training of trainers.

How is it possible for 72% of respondents to 'prepare training

programmes' (Table 17) and 69% to 'develop training courses' when only 50% of the sample are 'writing training objectives' and 48% are 'evaluating training'? Similarly, how is it possible for T.O's to 'identify training needs' (71%) and 'prepare training programmes' when only 33% of the sample is involved in 'job training analysis'? One possibility is that T.O's only assume that they are writing training objectives or carrying out a job training analysis when they are applying formal techniques such as those applied in the works of Mager (1962) on objectives or the formalised evaluation techniques devised by writers such as Warr et al (1970) or Hamblin (1974). The best may well be the enemy of the good. This may suggest the need to simplify procedures or supply a format of do-it-yourself procedures which are readily applicable within the complex operational situation within which T.O's are working and the need to continually relate increasingly complex expectations to the realities of application in office or shopfloor situations.

The bottom 10 roles show considerable agreement in at least half of the items. Common areas of minimally-used role areas are 'using simulators', 'psychological testing', 'applying O.D. techniques', 'applying P.I. techniques' and 'using interactive techniques'. The rejection of these role areas, particularly the use of O.D., P.I. and interactive techniques, apparently points to a type of T.O. whose expectations relate to the more conventional, if basic, training roles.

The main changes over the three year period, not always illustrated by top 20 and bottom 10 comparisons, were as follows:-

assisting in the development of organisational change (33% to 57%)

identifying training needs (57% to 71%)

assessing future manpower requirements (26% to 45%)

measuring job performance (28% to 40%)

working with T.U's (29% to 43%)

preparing training programmes (59% to 72%)

formal lecturing (38% to 53%)

writing progress reports on trainees (28% to 36%)

assessing performance of trainees (34% to 43%)

structuring training budgets (38% to 50%)

costing training (33% to 47%)

handling disciplinary problems (31% to 47%)

placing trainees (17% to 28%)

counselling (38% to 53%)

The greatest change areas illustrate a move toward an increase in activities which are generally accepted as being necessary for the effective operation of the training function, for example, identification of training needs, preparation of training programmes, the assessment of future manpower requirements, the structuring of training budgets, and the costing of training.

Most of the bottom 10 roles are similar in the one and three year time spans with the following four roles remaining in the same sequence at the bottom of the table:

applying P.I. techniques

applying O.D. techniques

psychological testing

using simulators

2. Firms: 100-299

The most common role in this group (Table 18) over a one year period was 'telephoning' (100%) but this has been discarded as it is an area of activity and competence which spans most service functions. Liaising with training board staff was high on the listing of both the one year (Table 18) and the three year group (Table 25) while 'maximising grants' is not mentioned in the three year top 20 although it forms part of the bottom 10 in the one year group. The 'administration of training' has moved upwards from 62% in the three year group to 87% in the one year group, developing training contacts (externally) also moved from 62% in the three year group up to 87% in the one year group.

A comparison of the sets of roles shows the following changes between the one year and three year periods.

Displaced from three year roles:

liaising with YEO

supervising trainees

administering courses (external)

working with T.U's

Insertions in one year roles:

structuring training budgets

using training budgets

costing training

assessing future manpower requirements

The above shows a heartening move towards a more cost conscious

T.O. who is apparently being given control over the determination and manipulation of financial resources while possibly diminishing roles related to a formal course organising and course running activities. The diminution in working with T.U's may possibly stem from a decline in the initial pressures generated by employee legislation in the early and middle 1970's (e.g. Health and Safety at Work Act, 1974) but may mark a retrogressive step in the potential industrial relations training area.

The bottom 10 roles are largely similar over both the one year and the three year time spans although 'formal presentation to management' and 'getting training accommodation' are replaced by 'membership of training committees' and 'using visual aids'.

However, a quarter of the respondents in this group are still involved in these bottom 10 role areas. What is of interest in this firm size is that no one participated in the following role areas:

recruiting and selecting instructors

using simulators

applying O.D. techniques

getting training staff

supervising training staff

psychological testing

3. Firms: 300-599

The T.O's in these firms also show a comparable upward drift in their activities among the top 20 roles as between the one and three year period (Tables 19 and 26): 'Working with management' has moved from 44% to 77%. One possible explanation for the increase in 'recruitment and selection' from 55% to 77% is that

the training function is expanding and moving towards a human resource function: increasing status and acceptability although not necessarily extending their training function. This extension in function is also reflected in what is conventionally considered to be a training role: the increase from 44% to 66% in 'preparing training programmes'. This is possibly counter-balanced by the slight extension of the 'administration of training'. It could be argued that the top five items in table 19 are administratively biased and more related to a broad human resource function and far removed from basic training roles such as 'identifying training needs', 'job training analyses' and 'evaluation'.

However, while there has been an upward move in the slightly esoteric 'assessing future manpower requirements', which now appears in the top 20 list of the one year roles, the role of 'identifying training needs' (55%) also makes an appearance. The new roles which appear in the one year top 20 are as follows:

assessing future manpower requirements

identifying training needs

working with T.U's

working with other service functions

writing training policy

handling disciplinary problems

'Writing training policy' is at first sight an upward extension of the T.O's role but there is a strong case for considering this role as one of default on the part of management, who have a responsibility for determining policy with the advice of the T.O. The appearance of 'handling disciplinary problems' also suggests a training function accepting, or being forced to accept, the disciplinary functions normally associated with management.

The following list of roles which have disappeared from the three year top 20 roles tends to raise more questions than it answers:

handling complaints

structuring training budgets

making grant claims

supervising training staff

getting training accommodation

increasing training budget

Is the decline in 'handling complaints' due to increasingly efficient T.O.'s or is it now subsumed under the new arrival in the top 20: 'handling disciplinary problems'? Similarly, have 'structuring training budgets' and 'increasing training budgets' disappeared from the one year roles because budgets are now structured or is it due to an absence of training budgets (which are not mentioned in the one year top 20)?

An examination of the bottom 10 of both the first and third year roles (Tables 19 and 26) shows the usual group of discarded (or unused) activities and techniques to which has been added 'using interactive techniques', 'measuring job performance' and (over the one year period) 'job training analysis'. Grant maximisation remains a low priority area in both time periods while there is still a liaising relationship with training board staff in both top 20 ratings even if it is showing a relatively slight decrease in one year role. The list also includes role areas which can logically be expected to rate low in small organisations, for example, 'training instructors', and 'getting training staff'.

4. Firms: 600-999

This group (Tables 20 and 27) is unique in that there is complete

agreement from all respondents on the top four roles ('administering courses' (internally), 'preparing training programmes', 'working with management' and 'identifying training needs', in the one year period. There is also a move toward the consolidation of administrative activities: 'administration of training' moves from 72% to 90%. The development of training contacts both internally and externally shows an increase from 72% to 90%, 'selling training to management' moved from 63% to 81% and 'liaison with training board staff' increases from 54% to 72%.

Some of the factors which tend to underline the increasing acceptance of the T.O. within his organisation are not in the top 20 but nevertheless help to underline the trend: 'using training budgets' increases from 27% to 45%, 'assessing future manpower requirements' rises from 27% to 45% and 'working with T.U's from 27% to 54%.

'Handling disciplinary problems' which almost tripled in the 100-299 group and doubled in the 300-599 group, appears in the top 20 of the one year roles with an increase from 54% to 72%. 'Lecturing' and 'counselling' activities show a steep increase (from 36% to 72%) and appear as new roles in the one year top 20 as do 'writing reports' and 'getting training equipment': both rise from 45% to 72%.

Exclusions from the one year list include 'assisting in the writing of training policy' (72% to 45%), 'recruiting and selecting instructors' and 'structuring training reports': the decline in these activities could be interpreted as due to the culmination, or decrease, in what may be seen is initialing roles carried out by the new T.O. in organisations in which both management and the T.O. have been developing the training function. A particular point of interest in this firm grouping is that it contained the highest single percentage (63% in the one year period) for the evaluation role.

Although applying O.D. techniques still appears in the bottom 10

of both years it is however gaining marginally, extending adherence from 27% to 36%. 'Using training budgets' moves from the one year bottom 10 and there is a zero return on 'using case studies'. The use of interactive techniques leaves the one year bottom 10 with an increase from 18% to 36%.

5. Firms: 1000-1499

The major change within this group (Tables 21 and 28) takes place in two role areas: 'assisting in the development of organisational change' (40% to 70%) and 'training instructors' (40% to 70%). The former can possibly be claimed as an upward extension of the T.O's function in terms of managerial acceptability and operating level but it is questionable as to whether this is a training role. The latter ('training instructors') is certainly within the ambit of the trainee but is likely to be a transient role in organisations of this size. The other roles which have shown upward mobility ('liaising with educational organisations' (50% to 66%), 'formal presentation to management' (40% to 50%), 'administration of courses (external)' (50% to 55%), only represent a slight shift in activities given the sample size ($n = 10$).

Certain role areas in those excluded from the three year period again suggest the phasing of operations from the initial development of the T.O's job in the organisation through to a point in its development where there is a fulfilment of requirements and a resultant cessation or diminution in activities. For example, 'preparing training manuals' has a 70% adherence rate in the three year period which declines to 40% in the one year period; 'structuring of training records' also declines (from 60% to 40%). This would hardly explain the percentage drop in the use of visual aids (70% to 50%) or the concomitant, if marginal, decreases in formal lecturing (60% to 50%) unless there has been a swing from the use of formal course-orientated training to the use of training as a tool for organisational change (from 40% to 70%). This decreasing use of formal teaching and associated hardware may also be explained by the recruitment

and training of instructors (40% to 70%) with the subsequent delegation of teaching roles.

6. Firms: 1500-1999

The results from this group (Tables 22 and 29) have very limited applicability as the sample member is very small (n = 6) but are worthy of examination if only to determine the extent to which their contents may reflect trends in the other groups.

The move towards the T.O's involvement in organisational change is illustrated in this sample: showing a change from 0% in three years to 50% in the one year period and an uncharacteristic interest in O.D. (0% to 33%). The other areas which tend to show an overall increase over the time span includes 'counselling', which moves from 33% to 83%. Both the 'identifying of training needs' (33% to 66%) and 'assisting in the identification of training needs' (50% to 66%) also show increases which match the general trend in most groups. But 'getting training accommodation' (33% to 83%) goes against the general movement and illustrates a role area which tends to vary between groups but is seldom given this degree of support. Other trends illustrated in this very limited sample support the general tendency to extend the formal roles of T.O's: both the 'administration of courses (internal)' and 'preparing training programmes' move from 50% to 83% over the three year period. 'Writing of training objectives' rates a unique support of 83% (from 50%). 'Using visual aids' also ranks relatively high in this grouping (83%) in each year and is well above the norm percentage for this role both in the all firm category and in individual groups.

The bottom 10 in the one year period shows a less clearcut set of roles and quite high percentage (33%) for the first three listings ('placing trainees', 'using interactive techniques and 'maximising grants'). However there is general agreement with other groupings on such areas as 'psychological testing' (0%), 'using simulators' (0%) and 'applying P.I. techniques' (16%

7. Firms: 2000+

This grouping of firms (Tables 25 and 30) differs from other firm role groupings in certain fundamental aspects: it is the only grouping which contains 'evaluating training' in the top 20 roles for both the one and the three year periods, 56% and 42% respectively.

It is also unique in that while it contains 'assisting in the identification of training needs' at a relatively high and consistent level in both the one and three year role periods (63%) it nevertheless excludes 'identifying training needs' in both top 20 role areas: this role has a 35% response rate. Greater consideration is also apparent in the roles relating to the training budgets and costing: 'structuring training budgets' has increased from 35% to 50% over the three year period and 'using training budgets' from 35% to 42%; 'costing training' has also increased (21% to 35%) in the same period. The use of the T.O. as an agent for 'assisting in the development of organisational change' (35% to 50%) suggests a tendency to extend the T.O's function beyond traditional training roles although it should be noted that 'applying O.D. techniques' remains at a low level (7%) in both the bottom 10 roles.

Roles which have been displaced from the three year top 20 are in the main due to marginal movements in top roles rather than fundamental shifts in role activities, for example 'counselling' goes from the top 20 although the coverage is similar (42%). 'Supervising staff', 'using case studies', 'recruiting and selecting trainees' all move from the top 20 but only with a marginal role percentage change: 42% to 35% in each instance.

The most surprising inclusion in the bottom 10 of both the one and three year roles is that of 'job training analyses' which decreases from 14% in the three year period to 7% in the one year term. The other four bottom roles ('applying P.I. techniques', 'psychological testing', 'using simulators' and

'applying O.D. techniques') all have a similar rating (7%) and tend to be common to the bottom 10 rating in most groups. Working with T.U's is contained in both bottom 10 groups at 14% but 'liaising with YSO' (21%), 'administering courses (external)' (21%) and 'handling complaints' (28% to 14%) replace 'placing trainees' (14%-21%), 'assessing performance of trainees' (14%-28%), 'writing progress reports on trainees' (7%-28%) and 'membership of training committees (external)' (0%-21%). The latter may illustrate a growing confidence on the part of some T.O's and a trend to the exchange of information and the use of internally-gained experience in external organisations.

Difficult, Time Consuming Roles and Key Areas

These three factors were placed adjacent to the 'one year' and 'three years' columns in the roles section of the questionnaire to attempt to establish a qualitative distinction between: (a) the roles which the T.O. performs, and (b) those roles in which he feels: a considerable amount of time is spent; the role is difficult to perform, or that it comprises a key area in his function as T.O.

Difficult Roles

One problem in using the 'difficult' category in the investigation of the T.O's job is the many interpretations which may be given to the word by the respondent: a situation which is compounded by the ways in which difficulties may also be viewed by those interpreting responses. The job holder may consider a job difficult due to his technical incompetence to carry it out; the difficulty may also be generated by the negative attitude of those with whom he is attempting to perform the role or may stem from the physical or financial conditions under which the role is being implemented. It may also arise from a feeling of threat which the T.O. perceives in his dealings with peers or senior management resulting from: minimal acceptance, a sense of inadequacy due to a limited understanding, or

a lack of clarity in a relatively new job area.

A further problem in interpreting difficulties in this situation is that they are based on the perceptions of job holders and therefore have all the limitations built into situations where only one viewpoint is available. But one area of certainty is that they are real as far as the job holder is concerned and therefore must be considered as facts in the training environment of job holders when considering his training needs and those of individuals entering the training job.

Respondents varied widely on what they considered to be their most difficult roles (Table 32): this is illustrated in the considerable variation in respondents' replies within the top 20 items, ranging from 38% ('selling training to management') to 9% ('formal presentation to management'). Many of the T.O's either found the question impossible to answer or, less likely, had no outstanding difficulties. As relatively new training officers it could be expected that a major difficulty would be getting their views as a service function accepted by management, but this situation is not reflected in replies.

It is of interest to note that the function of 'working with management' was relatively low in the difficult roles listing at 10%, possibly suggesting that their main problem may be not so much in being able to do what management expect of them but rather in extending managements' view of the content and compass of the T.O's job. The listing also suggests that while T.O's have little difficulty in working with management they have a slightly greater difficulty in working with T.U's.

The second role listed ('assisting in the development of organisational change', 34%) may appear due to an expectation of their function as potential change agents in organisations where training is viewed in the more traditional sense of formalised learning through the preparation of training programmes (12%).

The expected areas of difficulty came further down the list particularly those of 'evaluating training' (21%), 'increasing training budget' (16%) and 'costing training'. Both 'assisting in the identification of training needs' and 'identifying training needs' also had low ratings (14% and 12% respectively), possibly underlining the need to keep in mind the realisation that the actual task may be difficult to undertake but that these difficulties may be minimised either by the confidence of the T.O. in his role or by his inability to understand the full implications of failure to carry out the role effectively and perceive the actual difficulties inherent in the training assessment role.

The other end of the difficult role spectrum was illustrated in the bottom 10 role areas: five roles showed a zero return (supervising trainees, administering courses (internal), using simulators, telephoning and using visual aids). Respondents also found little difficulty in liaising with educational organisations, administering courses (external), applying P.I. techniques and membership of training committees (externally).

Rodger et al (1971) found a similar difficulty in getting a response to the role difficulty question but had a greater measure of agreement among their respondents on what constituted the top 10 of difficult parts of the T.O's job. These difficulties were concentrated on the problems of getting resources, e.g. trying to get more staff (71%), trying to get more space (67%), trying to get more money (60%); although there was also evaluation-related topics such as 'costing training' (64%) and 'gathering evidence of the value of your training scheme' (62%). Areas of common concern in both studies were as follows: 'increasing training budgets', 'evaluation' and 'selling training to management'. The latter was top of the 'difficult' top 20 at 38% in the present study and ninth at 51% in the Rodger et al research. The basic difference between the two sets of findings would appear to be a shift towards what have come to be generally accepted as specifically training areas and away from a demand for resources. But any conclusion drawn from

such limited material must be suspect and can only indicate in the broadest terms rather than specify areas of general difficulty. However the existence of the three top 10 difficulties may suggest logical interlinking of factors which taken together could help perpetuate difficulties in the job of T.O's: the T.O finds difficulty in 'selling training to management' and is therefore unable to 'assist in the development of organisational change' because he cannot 'evaluate training' or exhibit competence in 'measuring job performance'. Rodger et al illustrate a similar problem pattern for the T.O. in the context of the T.O's inability to sell training to management: they argue that the lack of staff (particularly instructors) and the inability to identify training needs and analyse jobs leads to a vicious circle in which training is unacceptable because it does not produce results but cannot produce results because it is starved of resources. The present research does not indicate resource starvation but does indicate the existence of similar difficulties in the selling and evaluation of training but for a much smaller part of a more limited sample.

Time Consuming Roles

The major difficulty presented in attempting to determine how the T.O. allocates his time (Table 33) is that of finding a method which respondents can answer conveniently and which reflects with accuracy the actual time spent on his various roles. Any attempt at the precise quantification of time allocation would run into the immediate difficulty of the respondent having to chart and quantify time spent on individual roles and, even if this was administratively possible, there is the attendant difficulty that time-consuming roles in one part of a given time span may be dissimilar to those performed in another. This is likely to be the case in roles with a relatively long time span, for example, craft training or management development activities. It was therefore decided to ask respondents to simply tick those role areas which they accepted as time-consuming.

This umbrella approach has the limitations that it invites very generalised answers based on the job holders interpretation of what he considers to be time-consuming and is open to the bias that respondents may equate time-consuming roles with roles that they believe T.O's should not be performing and, by definition, any time spent on these roles is both time-consuming and wasteful. Even given the accurate isolation of roles that are time-consuming there is no guarantee of a direct relationship between time spent on a role and the effectiveness of the participants resultant performance in that role.

The picture that emerges from the top 20 time-consuming roles is of a mixture of both training and administrative roles with the preponderance of roles being within the traditional training ambit. 'Preparing training programmes' tops the list (47%), followed closely by the 'administration of training' (43%) and 'identifying training needs' (40%). The T.O. is therefore still apparently beset with a time-consuming administrative role which may also be matched by roles which are not generally considered to be specifically training-orientated roles such as 'recruiting and selecting trainees' (36%) and 'travelling between sites' (35%), although it may be argued that success in the former role may be a prerequisite to success in the training function.

The overall impression is that of a T.O. who sees himself as being mainly involved in traditional training roles but who is also investing time in the development of organisational changes as well as performing administrative roles related to training activities. Training board activity in the area of grant claims is still viewed by a minority (22%) as a time-consuming role with a slightly smaller percentage (17%) opting for 'liaising with training board staff' as a time-consuming area.

These returns differ from those made to a similar question in the Rodger et al study (1971): they found a preponderance of clerical and administrative activities in their top 10 time-consuming items with only three directly related to the training

process. Both researches illustrate a wide range of roles which are considered to have a time-consuming element with little general agreement on what are the most time-consuming roles: in the Rodger et al study only five items were classified as time-consuming by over 50% of the sample. In the present study the percentage difference between the top and bottom of the top 20 time-consuming roles shows divergence of from 47% (preparing training programmes) to 16% (using training budgets). The major difference, in this context, between these studies relates to a change from time-consuming roles in administration and clerical activities to specifically training-related items in which administration is included but in the context of the training function. Common time-consuming activities were 'telephoning' and 'keeping up-to-date with training literature', both of which could be expected from any service personnel.

Respondents in the EITB (1973) research were also asked to rank the most time-consuming items of their job but only the top five are listed in the research without an indication of response percentage. The role items used in the EITB research are generally much broader in content than those of the Rodger et al study and in the present study making it difficult to establish comparisons. However, the EITB top five items are all purely training orientated and are given the following time-consuming priority listing:-

1. Organisation of training
2. Design and preparation of training programmes
3. Establishment of training priorities
4. Identification of long and short term training needs
5. Establishment and use of procedures for induction, appraisal and development of employees

If these headings are equated with those in table 33, there is

a considerable measure of agreement between the time-consuming items in the present study and those of the EITB study given that 'organisation of training' may be accepted as relating to 'administration of training', and 'design and preparation of training programmes' as somewhat similar to 'preparing training programmes'. Similarly, the EITB items 'identification of long and short term training needs' and 'establishing training priorities' relate closely to 'identifying training needs'.

An exception to this general consensus on time-consuming roles is the final EITB item ('establishment and use of procedures for induction, appraisal and development of employees') which is too broad for the establishment of any connection with either the Rodger et al or the present study.

Key Areas

This part of the questionnaire was inserted in the role area to determine what the T.O. considered to be important. It could be argued that the T.O's perception of importance may not necessarily coincide with those of the organisation, there is nevertheless a justification for accepting the possibility that not only will the T.O. have professional or other standards (e.g. comparisons made with fellow T.O's) which may be different from the organisation but he will also be subjected to pressures within his organisation to aspire to, or attain, certain organisation-related requirements. These organisational pressures and the priorities which they generate will be reflected in the T.O's interpretation of his key areas whether or not they are related to the key areas which, in his view, the T.O. should be performing.

Because of the considerable importance these views will have on the determination of training needs for future T.O's, an attempt is made to compare the key areas for the 'all firms' group with those of T.O's in each of the firm groupings and also to relate the key areas to roles covered in the last year. A comparison is made between the top 20 roles carried out by

the T.O. and those roles that the T.O. views as key to his effective functioning to determine the extent to which a gap exists between what the T.O. does and the roles he considers central to his job.

Key Areas: All Firms

There was a general lack of agreement on what constitutes the key areas in a T.O.'s job with a spread of key areas (Table 34) in the top 20 ranging between 64% (working with management) to 21% (assessing future manpower requirements). The content of the table is even more worrying when we find that only 57% of the sample accept 'identifying training needs' as a key area and 53% the 'selling of training to management'. Certainly the top five items in table 34 relate to the general expectation of key areas in the T.O's job and it could also be argued that the relatively high positioning at 34% of 'assisting in the development of organisational change' suggest T.O's involved in the higher levels of management. But this is more than counter-balanced by the absence of a series of roles which are by general consensus viewed as essential to the effective operation of the T.O. 'Evaluating training' is only mentioned as a key area by 16% of the sample while 'using training budgets' accounts for 12% and 'costing training' by a mere 9%.

All the role items were ticked in the 'all firms' sample with the exception of 'using simulators' which had a zero rating. Among the bottom 10 are 'applying P.I. techniques' (2%) and, rather surprisingly, 'increasing training budgets'.

Comparison of All Firms with Firm Groupings (Tables 35-40)

The item which tops the 'all firms' group (working with management) has a wide variation in support across the spectrum of firm sizes with variations ranging from 87% (100-299) (Table 35), 83% (1500-1999) (Table 39), 81% (600-999) (Table 37), 50% (1000-1499) (Table 38), 44% (300-599) (Table 36). It does not appear in the 2000+ top 20 (Table 40) but since the grouping

has 'selling training to management' in the top position there may have been a tendency to juxtapose these two roles. The role of 'identifying training needs' appears high on the top 20 list of key areas for most groupings with the exception of the 300-599 group where it is only mentioned by 33% of respondents. One factor which stands out in the comparative examination of key role areas is the extent of the variation of responses contained within the top 20 roles: this varies from 87% (working with management) to 38% (costing training) in the 100-299 group to a variation from 70% (identifying training needs) to 10% (structuring training records) in the 1000-1499 group. This almost anarchistic condition is also apparent in the variations which exist between what is considered to be key areas by T.O's in different sizes of firm. For example, 'structuring training budgets' is a key area for 40% of respondents in the 2000+ group (ranked 6 in the top 20) and 50% in the 100-299 group (ranked 10 in the top 20) but does not appear in the top 20 of the 'all firms' group or any other firm grouping.

Similarly, 'job training analyses' - traditionally considered to be a major role area for every T.O. - has a zero rating in the 2000+ and is only mentioned in the top 20 of the 1000-1499 group with a marginal 16% response rate. A further role which is normally associated with the key role area of the T.O. is that of 'writing training objectives' but even this apparently common denominator requirement has a response rate varying from 35% (2000+ group) to a 16% response (1500-1999 group) and is not rated in any of the smaller groupings. 'Evaluating training' only appears in two groupings (600-999 at 27% and 1000-1999 at 20%) and surely presents an intriguing situation: the justification for the absence of which can only be conjectured. The most obvious reason is that T.O's only assume that they are evaluating training when they are applying the systematic techniques illustrated by such writers as Warr et al (1970) and Hamblin (1974). The latter made the point that the question 'should we evaluate training?' was a nonsense question since the effectiveness of training is always measured even given that

the yardstick may be the intuitive sense that training activities are providing a solution, albeit partially, to organisational requirements. However, a further possibility for the apparent lack of interest and the inability to realise the importance of the evaluation role may stem from the unwillingness, or inability, of practitioners to determine training objectives as a prerequisite to evaluation. An examination of the objective-setting role also illustrates it as an area which is seen not only as low in the scale of key areas but which appears to be neither a time-consuming (Table 33) or difficult (Table 32) role. There may also be a link between the low-key status of evaluation and the apparent lack of cost consciousness on the part of T.O's, as illustrated by the relative unimportance attached to role areas such as 'costing training' and 'using training budgets'.

It is also noteworthy that while 'making grant claims' appears in four out of the six top 20 roles within firm groupings there is only one countervailing mention of 'grant maximisation', the relative unimportance of this latter role may stem from a growing disinterest on the part of organisations in interpreting the T.O's function as a mere grant maximiser or signal a lack of interest in the financial blandishments of Training Boards. But a further possibility is that the T.O. is not being pressed within his organisation to use his potential as a cost-cutting investment in human resource. There has undoubtedly been a tendency on the part of some organisations in the past to use grant maximisation as a blunt instrument for the measurement of the effectiveness of their T.O. and possibly development.

One interesting feature that arises in the comparison of the 'all firms' category with those of the other firm groupings is the apparent unanimity among the individual groupings on what are not considered to be key areas: each bottom 10 grouping has a zero return on all roles listed. Common areas not considered to be of importance are: using simulators, applying P.I. techniques, training instructors, placing trainees and (surprisingly) using visual aids. However, there is little

agreement between individual bottom 10 groupings on what constitutes a key area: 'applying O.D. techniques' appears with a zero rating in the two smallest groups; 'maximising grants' in the bottom 10 of any other grouping; 'job training analyses' is included in the bottom 10 of the 2000+ grouping, but does not appear in any other groupings.

An attempt was made to correlate the variations between the key areas across the complete sample with those in individual firm groupings. This shows (Table 31) the Spearman correlations for each grouping with a high of 0.7925 in the 600-999 grouping and a low of 0.5857 in the 1500-1999 grouping: possibly suggesting a limited correlation between key areas but certainly not providing sufficient evidence to suggest the existence of commonly agreed areas of importance for T.O's.

The findings of the present study bear little similarity to those of the Rodger et al study (1971) with the exception of the two top roles which are virtually similar: 'selling training to management' is top of the Rodger et al list of 'important activities' with an 88% response while it is third from the top at 53% with 'working with management' top of the present study at 64%. 'Identifying training needs' is second in the Rodger et al research and also second in the present research. The evaluation function rates very high with Rodger et al and is specified under the general heading 'gathering evidence of the value of your training schemes': it does not appear in the top 10 of the present study. The selection and recruitment of trainees also ranks high within the top 10 of Rodger et al and is also included in the current study but with a much lower response rate (34%): the span of response in the top 10 of the former study is between 88% and 72%.

The following role areas appear in the top 10 items of the Rodger et al study and are absent from the present work: training of instructors, discussing the progress of trainees with management, placing trainees, keeping in touch with

Technical Colleges and travelling to other establishments to inspect, supervise or advise on training. It is of interest to note that neither group viewed their relationship with Training Boards as justifying a top position as a key area or important activity although 'making grant claims' is thirteenth in the key areas but within a 26% response rate.

Comparison of Key Areas with Ranked, Difficult and Time-Consuming Roles

A comparison of the T.O's perceptions of key role areas with ranked roles, difficult roles and time-consuming roles shows a considerable divergence (Table 41) in the interpretations of T.O's. However, there is some agreement between key areas and roles performed: 16 of the top 20 roles are included in the top 20 key areas although there is a wide diversity in the positioning of rankings.

'Working with management' is top of both the key areas and the roles performed but the second key area is listed 7 in the role column. It would appear from this that while T.O's differ in the relative importance of key areas in the comparison with ranked roles there is nevertheless considerable congruence between their interpretation of what constitutes the important parts of their jobs and the roles which they perform. The comparison also illustrates a difference between key areas and roles on the one hand and difficult and time-consuming roles on the other. The section on difficult roles comprises only 9 of the 20 items mentioned in the key areas although the top ranked difficult role ('selling training to management') is among the top 3 of the key areas and the second top difficult role ('assisting in the development of organisational change') is ranked 6 in the key areas. The majority of difficult roles ranked in the comparison with key areas relate to role areas relatively low in the difficult role top 20. If the 1, 2 and 5 rankings in the difficult role top 10 are ignored it would appear that respondents did not generally encounter difficulties in carrying out, what they considered to be, their key areas.

But this is not a realistic assumption if we evaluate 'selling training to management' or 'assisting in the development of organisational change' as roles of fundamental importance in the T.O's job.

There is also a measure of disparity when we compare the key areas with the time-consuming roles: there are only 12 top 20 time-consuming roles in the key result section. But we must temper this quantitative comparison by examining the relative importance of these 12 time-consuming roles in the effective functioning of the T.O. The main points of note are that the top 8 key area roles coincide with time-consuming roles, although the latter are at a lower ranking, and the first, second, third and fourth time-consuming roles are included in the top 8 key area roles. This would suggest that the T.O. equates his most important time-consuming roles with his priority areas. It must also be added that after the eighth key area little relationship appears to exist between key areas and time-consuming roles: denoting an absence of any tie-up between the importance to the T.O. of his key areas and the amount of time the T.O. spends on them within the second half of roles. It is also of interest to note that the key area role 'making grant claims' coincides precisely with that of the similarly rated time-consuming role at the thirteenth position but is not included in either the role ranking or the difficult role top 20. It would appear that while respondents considered their grant maximising activities to be both important and time-consuming they did not view them as difficult: possibly suggesting that the hostility which a decreasing number of organisations appear to have for the training boards is not necessarily shared by personnel who are directly involved with training boards staff and their administrative requirements.

Rodger et al also make a comparison in their research between what they termed 'most important activities' and the ranking of items as part of the T.O's job and time-consuming activities. They found that when comparing the most important activities with the ranked items only four of the ranked items appeared in

the top 10 of important activities and also that only two of their time-consuming items were included in the top 10 of the most important activities. The present study indicates a much closer relationship between the key areas and both the ranked roles and the time-consuming roles: 6 of the ranked roles and 6 of the time-consuming roles appear in the top 10 of the key areas. The relationship is stronger if the comparison is widened to a consideration of the top 20 key areas: there are 16 ranked roles included within the top 20 key areas, although at differing sequences.

T.O. Roles within the Engineering Classification

The role rankings of T.O's in engineering organisations were isolated (Table 42) and examined to determine the extent to which their content related to that of the role activities utilised in the EITB (1973) study. A major problem in this comparison was the extent to which the EITB grouped a whole series of role activities within each section of their job description listing of 14 items: a listing which originated from a joint Training Board publication (1972). Table 42 illustrates the similarities and differences between the two sets of results. It was not possible to equate the first item in the EITB research listing ('advising on establishments and using procedures and techniques for the induction, appraisal and development of employees') but there was a close proximity between some of the top 20 listings in the present research: the second item listed ('organising the training and development of particular categories of staff throughout an organisation and securing the cooperation of all concerned' (87%)) by the EITB, although extremely broad in content, relates closely to the 'development of training contacts' (87%), 'administering of training' (87%) and 'working with management' (100%).

Similarly, the EITB research has an item relating to the design and preparation of training programmes, which also includes analysis, appraisal and the specification of training objectives: this item has a 91% response rate in the activities

listed. The present research has similar levels of support for some of these activities but they are spread over a number of response areas: 'preparing training programmes' (87%), 'writing training objectives' (87%).

However, the inclusion of analysis and appraisal in the EITB item makes any strict comparison extremely difficult and limits the usefulness of the EITB returns. But comparisons are more meaningful in the area of identifying training needs: although the omnibus approach of the EITB job item, which includes needs 'at organisational, job and individual levels', tends to limit the degree of accurate comparisons. This item had a response rate of 78% in the EITB research and a 100% rate in the current research.

The comparison also illustrates areas of difference between the two sets of responses: the identification and assessment of future manpower requirements has a response rate of 31% in the EITB returns and 62% in the present study. The preparation of budgets also shows a greater degree of activity among present respondents in the area of budget preparation: 28% as against 62%, but this comparison is again limited by the inclusion of making and using manpower supply and demand forecasts. The area of recruitment and selection also shows a difference in responses with the EITB having a 54% rate as against 100% in this research.

It is only possible to conclude from these comparisons that, while there was no broad or fundamental differences in areas in which meaningful comparisons could be made, nevertheless the way in which the EITB grouped a number of job areas within each item severely limits the usefulness of the material and makes any detailed comparisons with this or any other research extremely tenuous. This difficulty is compounded in the current work by the limited sample size (n = 8). On the positive side it may be argued that the present sample shows a greater unanimit in terms of agreement about roles: there is complete unanimity among respondents in 6 of the top 20 roles and the minimum

response rate is 75% within the top 20 role grouping.

The Engineering group was the largest single industrial classification within the sample and points to a reasonable degree of homogeneity among respondents in this industrial group suggesting that there may be a case for considering the isolation of general role areas in the context of an industry as against that of size of organisation, although industry-related studies completed in the 1960's and 1970's (Construction ITB (1968), Local Government TB (1976), Chemical and Allied Products ITB (1973) and the Carpet ITB (1975)), while often lacking precision and depth illustrate a tendency (see page 213) towards limited and conventional role expectations.

Roles T.O's feel that they should be performing

This question was inserted to ensure that all the possible roles performed by a T.O. in an organisation were covered and to give the respondent an opportunity to not only add roles which he feels should be fulfilled but also to give reasons why these roles were not being fulfilled. The question precludes those training roles which management believes are not being carried out by their T.O. but it is hoped to cover this requirement, at least to a limited extent, by giving the manager for whom the T.O. trains an opportunity of indicating how he views major areas in training as compared with how the T.O. sees those areas: this viewpoint is included in Section 4.

Earlier researches have highlighted, (a) the training areas in which T.O's were engaged and which they felt were of little relevance to roles which they feel they should be carrying out and, (b) the role areas in which they were not engaged but which they believed were essential to an effective training function. Among the former was a preponderance of complaints about the extent to which T.O's were involved in administrative and form-filling activities. This has been a common area of complaint and appears in the Rodger et al (1971) research and also that of the EITB (1973) as well as the Bath University research

(Frank (1975)). Apart from a surprising number (56%) apparently accepting their existing job areas, this research (Table 43) illustrates a tendency for T.O's to want a role "administering and controlling training" in addition to their existing roles: this was the most common requirement and possibly suggests a movement away from the training-orientated T.O. to one who relates more to the involvement of others in training with success measured in the context of developing and administering training rather than as a practitioner in training activities.

The second group of areas which have been isolated in researches as being essential for activities for T.O's but seldom carried out has been those of evaluation and budgets: it being considered that T.O's were insufficiently involved and should extend their job activites to help ensure the effective structuring and application of training budgets(this need was also particularly stressed in the EITB research) and also engage in activities which would hopefully lead to the effective evaluation of training activities. While this latter activity had a number of mentions (4) it is not seen by respondents as one in which they are not performing, although they were often disappointed with the extent of their evaluation activities and results achieved. It is of interest to note in the large US study, done by the ASTD (1978), that while both of these activities were rated in the top 25 job content items of the practising trainer they only had ratings of 15 (evaluate training and development) and 17 (prepare training budgets), which suggests a continuing gap between the 'ought' of training literature and the 'actual' of training activities in at least two fundamental areas.

Table 43 fails to show any demand for T.O's to move into what may be considered to be the more exotic training activities with which current training literature is showing an interest: human asset accounting and interactive skills have only one devotee in this study. The enabling/internal consultant role is mentioned on three occasions possibly reflecting a lack of

knowledge of relevant techniques, an unwillingness among senior managers to accept the functioning of T.O's within the higher echelons of the organisation, or a lack of confidence in the application of techniques on the part of T.O's. These difficulties have been effectively analysed in the researches of Cotgrove and Johnson (1973) (see page 210).

The contents of Table 43 do not illustrate any definite trend in the extension of existing roles or the development of new ones but rather a tendency among T.O's to stay within existing, if stereotyped, activities and possibly a need to establish themselves in known, and possibly accepted, roles before extending themselves into new and untried areas at a time when their existing functions may be neither fully understood nor completely utilised. A further possibility is the unwillingness of managers to extend the function of T.O. upwards within the organisation if they have previously been recruited to undertake relatively low-level work (e.g. operative craft training).

The most common reasons given for not being able to perform roles which T.O's felt they should be performing were the lack of time and available staff - two reasons given for the limitation of function in the Rodger et al study - this was followed by the fact that there was no demand for the role on the part of management. This apparent scarcity of training resources, although apparently uncommon, could point to a need for the training of management on how to effectively utilise a comparatively new and possibly externally-derived, training function.

The lack of available time to extend existing functions may point to an inability on the part of T.O's to organise their time effectively or possibly results from cost-conscious management minimising a service function which offers immediate (if short term) financial savings in times of economic stringency: the traditional 'production versus training' argument.

T.O's Areas of Greatest Impact

A continuing cause for concern in the T.O's job has been the minimal impact which they have apparently made in their organisation. Researchers (Rodger et al (1971) EITB (1973)) have tended to analyse the level of impact in terms of snags which limit effective operation and the development of potential, rather than attempting to determine areas in which T.O's feel they have made a positive contribution to the establishment of the training function or organisational goals. The accentuation has therefore been on factors limiting impact rather than on actual or perceived areas of impact. Among the measures given by practitioners for this lack of impact as a function within an organisation are those cited by Rodger et al (1971) which included: lack of resources, status and career prospects, unfavourable management attitude, and difficulty in the identification of training needs and the evaluation of results. The Engineering ITB (1973) approached the situation of the T.O's job from two viewpoints: (a) the organisation of the department within which the T.O. worked and, (b) the position of the T.O. within the organisational hierarchy. Their findings point to a lack of impact of the T.O. due to: the existing age structure, the lack of a broad experience on the part of the T.O's and the fact that the T.O. population reflected the needs of the Training Boards rather than a positive demand from organisations for the services of a professional T.O. with the competence and credibility necessary to move from the area of initial demand, i.e. operative and craft training, to the more comprehensive areas of human resourcing, and specifically, management development. The EITB research document questioned the ability of the existing T.O. population - generally recruited from and acceptable to, the lower levels of the organisation - to make an impact at the higher levels of their organisation. The research underlines the absence of any impact, or even a broadly accepted job responsibility, in two areas which the EITB regard as vital to the training specialist: (a) management development, and (b) organisational review and analysis.

The question on the areas of greatest impact as seen by the incumbent ("In what areas of your organisation have you had the greatest impact? Give reasons") was included in the research in order to determine those areas in which the T.O. saw himself making progress and the reasons for the impact in those selected, or imposed, areas of training. The replies to this question were summarised under a series of headings (22) based on areas covered in the answers to the question. The question was answered by 51 respondents most of whom cited more than one area of impact. The greatest single number (16) in the sample (Table 44) mentioned 'Management training' as being the major area in which they felt an impact had been made. This was followed by 'Supervisory training' (7): 'Craft training' and 'Acceptability to management' both gained a mention from 6 respondents. Low in areas of impact were 'O.D. consultant' (1), 'Clerical training' (1), 'Instructor training' (1) and 'Resources increased' (1).

The reasons given by respondents for their impact in the area of management training are of particular importance since this is universally regarded as a key function within the T.O's job particularly if he is to have any credibility as a human resource functionary. The reasons given included the fact that it was seen as a pay-off area by the T.O. and, increasingly by the organisation, and an area in which little activity had previously taken place. The extension of credibility gained in other areas of training (e.g. Supervisory training) also helped the T.O. in this field. The pressure from safety legislation (1974 Health & Safety at Work Act), with its accentuation on personal liability for accidents may also be acting as a stimulus for safety training at management level as has the increasing use of appraisal system of which management training is becoming a by-product. Senior managers, it was also stated in returns, were also willing to train younger managers, particularly those in the lower and middle management levels even when they felt it unnecessary for themselves. The participative philosophy being currently built into management training and development schemes (see Pedler et al (1978)) and

(Hague (1973)), with the accentuation on self development and one-to-one counselling, also helps make training at this sensitive level more acceptable to management-level staff who may feel threatened by the implications of change or find traditional mechanistic training programmes both time-consuming and irrelevant. The initial status of the training officer, for example, as craft or supervisor trainer, is less likely to be a stumbling block where his function becomes that of an adviser on methods and a source of information on techniques rather than a participating trainer.

One feature which has failed to emerge in returns as area of impact was that of 'O.D. consultant' (1) and 'Team building' (2), despite the considerable spate of literature on O.D. activities as an 'ought' requirement for the T.O. Few of the respondents claimed to have made an impact in terms of attaining increased resources as potential cost reducers, although 13 respondents mentioned such terms as 'increased profitability', 'saved money', 'increased efficiency of manning levels', 'decreased training times' and 'decreased labour turnover': any objective measure of these factors would be difficult to determine but there appears to be a general awareness among respondents of the need to build acceptability through the medium of apparent organisational needs as a means of attaining impact in training areas at higher levels in the organisation than those of their existing activities.

Career Aspirations

The future training requirements of T.O's are being related increasingly to job performance expectations in their current job (Kenny (1979) and MSC (1978)) and within the context of their boundaries and relationship with the role set of their organisation (Pettigrew and Reason (1978)). But it would be unrealistic not to take into consideration the developmental expectations of T.O's as envisaged by their perceptions of their career aspirations in the forseeable future. Do respondents view their present job as a path to a wider career in the field of human resource management, a stepping-stone to

a managerial position or simply as a function to be maintained, or possibly extended, in the present organisational environment? A basic assumption in the area of career aspiration was that respondents were aware of the contents and problems related to their areas of aspiration and that they had the potential competence necessary to fulfil their expectations.

Respondents were asked to answer the open-ended question 'What post do you expect to fill in 3 years time?' It was considered that a longer period may have led to projections based on unclear or unrealistic assumptions and expectations, while a shorter time span would not have given respondents the time necessary to develop expertise in their current job as a preparation for future prospects, particularly as respondents were relatively new to training and this was their first training job.

A number of respondents (20%) saw their career (Table 45) as remaining within their present job: there was a concentration in the 51+ age group, the remainder of this latter group were either retiring (3%) or uncertain of their future (3%). The largest category of career expectations was in the area of personnel management: 23% of respondents had future aspirations in this area with a concentration (9%) in the 41-50 and under 30 age groups. A further grouping, comprising 20% of the sample, were in the 'don't know' category, closely followed (18%) by those wishing to extend their current training function. Line management, as a career aspiration, only accounted for 14% of the sample.

A large minority (38%) appeared to be content with their present job as trainers and planned to remain in their present post or to extend it. This suggests that respondents largely view their middle term expectations with acceptance, if not enthusiasm: expectations which may derive from their inability to move to other job areas due to the current economic climate or from an ability to derive sufficient job satisfaction in their present job either in the maintenance of present activities

or in the potential for change. It is also possible that respondents, being relatively new to the job of T.O., may feel a need to gain more experience and acceptance in their current position prior to making any projections about future changes.

These responses also reinforce the point, made in Section 4, that a large minority of respondents view the personnel function as an extension of the training function either because it is viewed as a natural extension of their initial training activities, particularly in areas such as selection interviewing at craft level, or as the spearhead for the introduction of legislative requirements (e.g. Health & Safety at Work Act), or simply by a default on the part of their employers who may be at a loss when it comes to the allocation of human resource activities.

Two trends stand out in the context of career aspirations. First, the under 30's age group apparently saw the training function as a stepping stone into personnel: 9% of the total 13% in this age group opted for this path into personnel management and only 2% of the 13% envisaged remaining in training but in an extended version of their current job. Second, the 30 to 40 age group, which comprised 32% of the total sample, had line management (11%) aspirations as their main category closely followed (9%) by a willingness to extend their existing job in the training function: only 3% wanted to remain in their present job. This trend away from training in the three year span of aspirations continued in the 41-50 age group, which comprised 35% of the total sample, with 7% opting for the extension of their present function and only 3% for the continuation of their current job. The only exception to this trend away from training was, not unexpectedly, in the 51+ age group, where 14% of the 20% in the group envisaged remaining in their present job. This group was also characterised by the relatively large number in the 'don't know' category (20% out of 32%): possibly suggesting a situation in which mid-career employees were languishing in a service function without any clear alternatives available to them or the possibility that

training is viewed by some managers (and possibly incumbents) as an outpost for the older manager-level employees who have outlived their usefulness in stressful managerial positions and now have a contribution to make in this relatively new field.

These trends varied from the career aspirations which emerged from the Rodger et al (1971) study in which just over half of the sample intended staying in training indefinitely (although 4 out of 5 respondents thought that training offered good career prospects) and about one-third were uncertain of their future aspirations. The Rodger et al findings largely coincide with the present research in that the most favoured career aspiration was in the area of personnel management although the second ranking in their preference scale was 'Management Consultant' and the third was 'lecturing': possibly reflecting areas of interest rather than potential competence.

The EITB (1973) study research showed trends similar to that of the present study in that 37% of the sample, as compared with 38% in the present study, wished to stay in training either in their present job (14%) or in another training job (23%) over a 5 year period. A further 26% aspired to jobs in the personnel function either in joint personnel/training roles, a personnel specialism or in the area of general personnel management; as against 23% in the present study. There was also a close coincidence in these aspirations among the younger respondents in both studies. The EITB research findings in this area also coincided with those of the present study in that a high proportion of the 40-50 age group did not know their future career aspirations: a situation which may result from the economic recession which marked the 1972 period when the EITB research was undertaken and which has close parallels with the present period in kind if not in degree.

It would appear from the above that there has been a change in expectations of T.O's since the mid-1960's in that fewer T.O's, particularly in the younger age groupings, view training as a middle or long term career aspiration and that the job of T.O.

is increasingly being viewed as a stepping stone to either the broader human resource role of personnel management or, to a lesser extent, as a step towards line management. In the case of the over-50's the apparent trend is to view the job of T.O. as a final stage in the job cycle in which it is likely to follow a position in management. This has the positive aspect that the relationships, expertise and acceptability of those with a management background can help establish and enhance their new career in this service function. But a potentially negative possibility is that the training function is being viewed by management as a soft option for older, less qualified, personnel who have contributed to the company in a managerial role and are transferred into a situation in which a central requirement is behaviour change at a time when their own capacity for change is likely to be diminished.

It has not been possible to determine the extent to which respondents' career aspirations have been motivated by dissatisfaction with their job as trainers or with training as interpreted by the jobholder's managers but the general view would appear to be that a majority of T.O's, both in the current research and in the other researches mentioned, would not wish to remain in their present job and that a small majority aspire to wider human resource or, to a lesser extent, managerial roles. It is not possible to determine the extent to which these career aspirations were motivated by the 'pull' of other job areas, e.g. the status and enhanced professionalism of personnel management, and the power inherent in the management function, or the 'push' of dissatisfaction with their present training roles. However, the reactions of respondents to role expectations and the areas in which they perceived as areas of impact (page 114) would suggest that 'pull' factors, generally towards the broader area of human resource management, were paramount in the determination of future career aspirations.

SECTION 5

ROLE CONTENT

Categories of Trainees and Training Functions

This section extends the theme of the common roles, or generalist, concept and is concerned with two main areas of respondents' jobs: (i) the categories of trainee covered by respondents and the extent to which these categories have changed over a three year period and (ii) respondents' perceptions of role content: even given agreement on common role areas, to what extent does the content of roles differ between respondents?

The first part examines the categories of employees trained by respondents and the extent to which there have been changes in categories trained over a three year period.

The use of specific categories to denote levels of training, while providing a convenient compartmentalisation, suffers from the limitation that there is no necessary similarity between the job content of, for example, a director-level employee in one organisation and that in another: the size of the organisation, turnover, technology, policies, perceptions, and the number of levels in the organisation's management structure are among the factors which will help determine roles and subsequent training requirements. It could be argued that categorisation suffers from fewer limitations in the lower levels of an organisation but there are still wide differences in training requirements within relatively homogeneous job categories such as 'operator' (e.g. chemical plan operator and sewing machinist) and, 'craftsman' (e.g. aircraft fitter and plumber). But categorisation does supply rough indices of relative levels and indicates considered status, if not function, and span of both responsibility and acceptability. T.O's were asked to complete a grid which comprised eleven categories of employee (Table 46) on the vertical axis and seven columns on the horizontal axis: the latter were structured to provide the

following information:

(i) categories trained in the current year;

(ii) categories trained within the last three years;

(iii) type or types of job training analysis used (T.W.I. Job Description, Seymour-Type task analysis, problem-centred, other);

(iv) administration and organisation of training;

(v) training activity carried out;

(vi) type of evaluation used over one and three year periods (management acceptance of training, pre and post tests, cost/benefit analysis, formal appraisal scheme, number of courses run, against pre-set training objective, not evaluated, other);

(vii) reaction of management to each category of training (very cooperative, cooperative, variable, uncooperative, hostile).

Trainee Categories

The initial activity carried out in this area was the sub-division of respondents into groups of training responsibility according to the categories or groups of categories which they trained. This was done with a view to the establishment of a comparison between the role contents of respondents within each category.

Groups

Group 1. Respondents who had a training or administrative responsibility in at least one of the following categories: Director, Senior Manager, Manager.

Group 2. Respondents who had a responsibility in at least one of the following categories: as in Group 1 above and Supervisors.

Group 3. Respondents who had a responsibility in at least one of Group 1 categories and at least one response in the remaining categories.

Group 4. Respondents who had a responsibility in at least one category in Group 2; at least one response in supervisory, sales/marketing, commercial, clerical, graduate/professional and technical block of categories and at least one response in the craft/operator or 'other' categories.

Group 5. Respondents in craft/operator category only.

Group 6. Respondents having one response in at least one of the following categories: supervisors, sales/marketing, commercial, clerical, graduate/professional, technician.

This approach to the analysis and comparison of respondents role contents in terms of category groups proved to be unhelpful since there was only one respondent in Group 1; three in Group 2 and a large block of respondents in the generalist areas of Group 3 (43 cases) and Group 4 (30 cases). There were no respondents in Group 5 (operative/craft training only) and only three respondents in the mid-level Group 6. It would appear from this analysis that a considerable majority of respondents could be classified as generalists, reinforcing the point made in Section 5.

The most common category of training responsibility over the 1 year period was that of supervisors with 83% of respondents training in this area (Table 46); this was followed by management training (76%), although the training of senior managers had a rating of 59%. Craft Operator and Technician training were also well represented at 62% and 58% respectively with a surprising 70% of respondents training the clerical grades: normally considered to be the Cinderella of training activities.

The lowest categories (sales/marketing, graduate/professional and commercial) still had a reasonable spread of participants with a low of 41%.

The above finding on categories trained exhibits several factors of interest. The inclusion of supervisory training as a function of the majority of T.O's may appear surprising considering the increasing trend in recent years to view this type of training as being potentially complex and politically sensitive (see Thurley and Widernius (1973)), particularly if the T.O. views the training activity as part of a coordinated activity aimed at enhancing managerial performance. Possibly the reality of supervisory training is less traumatic since it can vary in practice from the development of technical know-how, either externally or internally, in a formal mechanistic teaching environment, to informal job-centred problem-solving activities or team building exercises which may only be viewed by management as marginal to managerial activities and devoid of the potential for disruptive change. Supervisory training may also be considered by managers as the highest acceptable level of training: apparently giving managers an opportunity to accept and implement training activities that may involve them but is unlikely to affect them personally, particularly since they are in a position to maintain control of outputs in a way which may be more difficult in the fulfilment of their training requirements.

The gratifyingly high level of respondent's responsibility for management training would appear to show that T.O's are becoming more acceptable at middle and senior management levels although it does not necessarily suggest success in this function. One possibility for this increasing acceptance may be the number of respondents who have a management or professional/technologist background: 31% were recruited from management and 17% from the professional/technologist level. A further possibility is that management training is increasingly being seen as a necessity in the current economic climate (see Manpower Services Commission (1977)) and is high on the priority list

of both training boards and professional organisations.

One interesting feature in the comparison of categories being trained by respondents in the one year as against the three year period (Table 46) is the increase in training responsibilities for the higher level categories, particularly at the manager, senior manager and, markedly, at director level. This upward mobility of training responsibility - not necessarily training - towards the higher echelons of the organisation could stem from a series of causes: success in the lower levels of training could lead to a greater acceptance at the management level; management may be surrendering to the pressures from training boards and their own personnel services to apply an activity which has now been operating for some time in other parts of their organisation; the general trend in management training is towards self-development typified by the Pedler et al (1978) approach rather than the use of formal courses and is therefore less threatening and easier to relate to personal and, although this is arguable, organisational needs; T.O's appear to be gaining confidence in the application of management training techniques and are therefore in a better position to be given responsibility for the training of senior managers but not necessarily to train at this level; the growing awareness among senior managers that effective training cannot be a delegated function but is rather a participative relationship in which the T.O. helps structure learning situations and supplies expertise rather actively trains. The above factors are possible determinants of training policy at management level but it is not possible to point to specific, consistent or definite reasons for the undoubted upward movement of respondents training responsibility over the three year period.

The findings of the present study on categories of trainees for whom the T.O. was responsible shows a similarity with both the EITB and the Rodger et al researches on the primacy of the supervisory level in the T.O's administration and training activities: 83% of the present study have a responsibility for supervisory training compared with 65% (EITB) and 69% (Rodger et al).

Both the Rodger et al and the EITB studies illustrate a high level of activity in the technical categories (technologist technician, craft and operator) with management-related training activities less common than the present study: this may indicate a move over time (the Rodger et al study took place in the middle '60's and the EITB study in the early '70's) towards the wider application of training as an area of responsibility for T.O's even if it is only an administrative rather than a training function. The present study also indicates consistently higher levels of agreement among respondents of training responsibility for specific categories as compared with the other two studies: the highest category percentage in the Rodger et al study is 69% (supervisors) followed by craft apprentices (57%) while that of the EITB study is 65.6% (supervisors), closely followed by a 65.4% (operators), as compared with (Table 46) a high of 83% (supervisors) and a management category of 76% and 70% for clerical training. Substituting categories for roles, the present survey would appear to support both the Rodger et al (1971) and EITB (1973) studies in that: "Jobs differed both in the number of activities that T.O's carried out, and in the pattern, or combinations, of activities that comprised the jobs" (Rodger et al) but also suggests that there may be further grounds for acceptance of the broad concept of a training 'generalist' as defined in the Pinto and Walker (1978) research, which showed a considerable measure of agreement among respondents on common roles and trainee categories over fourteen job areas. This also suggests that while there are a limited number of specialist T.O's, the majority tend to be generalists with a large variety of training roles spanning wide categories of personnel.

Types of Job Training Analysis Used

There is a considerable measure of ambiguity both in literature and in practice in the use of terminology within the area of job training analysis, for example, Stammers & Patrick (1975), while noting the problems of terminology, state "the terms Job,

Task and Skill Analysis might be used inter-changeably or to represent different processes or even to refer to different stages within the same process" while the Glossary of Training Terms (1971) defines job analysis as a: "process of examining a job in detail in order to identify its component tasks, which results in a job description or, if carried out in depth, a job specification". Boydell (1981) supports this latter view in stressing that: 'Job analysis is a process of examining a job. Thus it is not a particular document, but rather gives rise to certain documents, the product of an analytical examination of the job'. It has become a truism to state that an essential role of every T.O. is the systematic analysis of jobs prior to training in order to determine learning requirements as a prerequisite to the design, structuring and implementation of training activities.

The work of Eckstrand (1964) illustrates a training system approach which starts from the definition of training objectives and the development of criterion measures, goes on to the derivation of training content and the design of training material. The system includes a continuing feedback loop within which discrepancies can be identified and training modified during the training cycle.

In contrast, the major studies into the training activities of T.O's both in this country (Rodger et al (1971)) and in the U.S. (Pinto & Walker (1978)) supply evidence to the effect that not all T.O's necessarily view this activity as an essential prerequisite for training: job training analysis ranks relatively low in all role studies of training and is unmentioned in the top 20 ASTD role ranking (see page 258). One possible reason for this apparent contradiction is the way in which practitioners define job training analysis. It would appear that this training role, like that of evaluation, is defined within the narrow terms of highly formalised procedures which often lead to a profusion of often complex (and unused) data: if the results of these time-consuming procedures are not utilised then T.O's assume that job training analysis has

not taken place. The reality is that job training analysis always precedes training, if we define the activity to mean any pre-training interpretation of the job content even if it is only at an intuitive or anecdotal level.

It was felt necessary not only to determine the level of support for the job training analysis role (see page 126) but also to examine the content of roles in terms of the functions which it contained for respondents. This section therefore attempts not only to extricate the role area but also to define the content or functions contained within the role of training analysis. This was done by sub-dividing the analysis role into six areas (Table 47) and asking respondents to denote the type, or types, of analysis used for each of the eleven categories of trainee. The major difficulty encountered in this area was the isolation of types of analysis which would be meaningful to respondents and it was decided to use the following approaches: T.W.I., Job Description, Seymour-type, Task analysis, Problem-centred analysis.

The term T.W.I. analysis is the least ambiguous since it is highly structured in method and content and derives from a central government agency (Department of Employment). The obvious limitation of this approach is that it can only be used for simple perceptual motor or clerical skills but it is probably the most common type of job training analysis in use within the U.K.

The 'job description' category is open to widely varying interpretations although it has been defined (Glossary of Training Terms (1971)) as: "a broad statement of the purpose, scope responsibilities and tasks which constitute a particular job". The major drawback is that it is necessarily a first approximation to job training requirements since it does not define the knowledge, skill or attitudes required for effective performance in a job and may also be the product of an administrative, rather than an in-situ, job analysis activity. However, the term 'job description' does indicate the use of

an initial approach to determine job content as a preamble to training.

The Seymour-type analysis (Seymour (1966)) is derived from Taylorian activities in which the analysis follows a Work Study format (designed to increase efficiency by isolating the knowledge and skill requirements of operatives engaged in largely short cycle repetitive manual activities) and therefore does not necessarily result in the isolation of learning difficulties. There are a multiplicity of formats used in this type of analysis which tend to derive from the situation in which they will be used (see Iron and Steel ITB (1966) and Ceramics Glass and Mineral Products ITB (1968)).

The term Task analysis used in this context is that developed by Annette et al (1971) and is defined (DE (1971)) as: 'A systematic analysis of the behaviour required to carry out a task with a view to identifying areas of difficulty and the appropriate training techniques and learning aids necessary for successful instruction'. Task analysis differs from the Seymour-type analysis in that it is a learning-based process designed to supply the information necessary to make decisions on the design of a training format which will result in the attainment of pre-specified criterion performance. It has been argued (Wellens (1979), Youngman et al (1978)), that traditional job-centred methods of job training analysis with their accentuation on job details have failed to take into account the needs of the trainee by failing to consider the interdependent relationship existing between the trainee, the job, and the organisation.

In Problem-centred analysis the job description/job specification sequence is short circuited and no attempt is made to determine overall key performance area: the analysis is concentrated on immediate and accepted problem areas. This approach is similar to the method adopted by Warr and Bird (1970) in their 'training by exception' in which activities are concentrated on circumstances exceptional to normal job-

centred activity and training, or other, solutions are developed and applied.

An examination of respondents' replies (Table 47) shows the limitations of the types of analysis used in the questionnaire as reflected in the percentage of replies contained in the 'other' types, particularly in the supervisory and management categories. In the absence of any explanation of what respondents meant by this term it may possibly by assumed that a hybrid approach has been used comprising a mixture of the other types of analysis or that respondents have been using analysis material originating from external agencies such as Training Boards and consultants. A further possibility is that the training of management-level staff has been carried out using external courses: with reliance for their justification and content based on the subjective views of the T.O. or his management.

The most commonly used type of analysis is that utilising the job description format. This is used in every category and specifically in management and clerical training. The T.W.I. method has its adherents in manual and clerical categories but appears to have only marginal significance for most of the sample. Task analysis is used over a wide band of categories from supervisor to craft/operator and is the most common type in this latter category while Problem-centred analysis, with its emphasis on perceived and immediate needs without formalised job-wide analysis, has some support in the upper categories particularly at senior management level.

The investigation into the types of analysis used was extended to cover firm groupings in the hope of attaining an insight into the types of job training analysis used in each of the firm sizes (Tables 48-53). Supervisors were the most common category to be analysed in all firm groupings with an analysis rate of between 80% and 91%: one exception being the largest grouping (2000+) where only 50% of respondents undertook the analysis of supervisory jobs. The greater part of analysis

activities in the larger firms took place at manager or senior manager levels: the second largest grouping (1500-1999) had an 83% response rate at senior manager and manager levels and the largest grouping (2000+) had a 64% response rate at manager level. There was a very low rate of analysis activity at director-level in all firm sizes, the lowest being the 1000-1499 grouping (10%) and the highest in the 600-999 and 100-299 groupings (54% and 50% respectively). There was also a wide divergence in analysis activities between firm groupings in the craft/operator category: this difference varied between a low of 21% in the largest group to a high of 75% in the smallest grouping with an uneven spread of activity between these extremes. The T.W.I. approach had a poor response rate in all groupings with the exception of the 600-999 group where it had some support particularly in the clerical and craft/operator categories.

Any conclusions drawn from this comparison of types of analysis used in relation to size of firm can only be highly tentative due to the small numbers involved, the low level of response and the apparent difficulty encountered by respondents in deciding how to label their analysis activities or alternatively their use of hybrid methods. This attempt at the isolation of types of analysis used by respondents has proved disappointing for two main reasons: (a) the extensive use of the "other" type has made it impossible to discover the actual methodology and content of the analysis activity used by a number of respondents and, (b) the number of missing cases within each category suggests that respondents were far from clear as to what they should be doing within this role area. This lack of clarity is bound to have important repercussions on subsequent training activities and particularly on the relevance of training to job performance. The situation may result from the current confusion in analytical typology and the earlier tendency to over-analyse in certain manual grades with a subsequent generation of unused material. There would also appear to be an important lack of discernment in the choice and application of specific types of analysis. In retrospect, it

would have been more helpful to have extended the types of job training analysis to include a structured approach to interpersonal skills as developed by Bales (1951) and Rackham and Morgan (1977) in which face-to-face behavioural requirements are analysed by using a grid format which can be applied at individual, group and organisational levels. This approach to job training analysis extends the activity beyond the traditional job analysis areas of manual and process operations, in which time-consuming mechanistic formats abounded, and helps fulfil the social skills requirements of jobs such as managers, sales and service personnel, where a sensitivity to interpersonal relationships may well be essential for effective job performance.

It would also have been useful to have asked respondents to indicate their definition of what they included in the 'other' category, possibly by the use of an open-ended question even at the risk of generating difficulties in the computation and comparison of results.

Administration and Training

The distinction between the functions of administration and training is of more than semantic interest since respondents have indicated (Table 17) a majority role in administration with a 78% response rate. The difficulty arises in the perception by T.O's of what is normally accepted when these terms are used. Certainly there are functions within these roles which are unambiguous, for example, the collation of information and the handling of paperwork engendered by the design and implementation of training programmes would usually be accepted as coming within the ambit of administration as would the completion of returns for training boards. Areas of ambiguity abound, for example, is the collection and analysis of information for assessment and evaluation part of the training role or an administrative role? Can the overseeing of training sessions, and the design and use of monitoring and recording procedures be neatly categorised as administration when they require an expertise in training?

The term training is also open to varying interpretations but is generally accepted in the broad sense as being: "The systematic development of the attitude/knowledge/skill behavour pattern required by an individual in order to perform adequately a given task or job" (DE (1971)). However, the respondent had a number of options in deciding the content and limits of using the word 'Training' to define the realities in a given situation. For example, if a T.O. chairs a session for directors and senior managers, or takes part in the induction training of new graduates, can he claim a training responsibility for these categories? Is the T.O. only training when he is in face-to-face contact with trainees in a formal learning situation or can he claim to be training when he structures organisational situations in which learning takes place? Writers on training, and particularly those who claim a consultant/facilitator role for T.O's (e.g. Nadler (1970), Kenny (1976)), have argued that both of these roles, and particularly the latter, are training roles. The Rodger et al (1971) study simplified the problem of distinguishing administration and training by limiting the comparison to administration and instruction but this is considered to be too narrow and constrictive a term in the current state of training.

The point must be made that, as we have seen above in the context of the use of trainee categories, there is no universally accepted distinction between the terms 'administration' and 'training' and the perceptions and interpretations of respondents reflected this lack of clarity in their responses.

Respondents were asked to indicate their areas of administrative and training responsibilities in the 10 trainee categories (Table 54) used in the previous section in order to determine the extent to which these responsibilities overlapped and the degree of mismatch which existed between these functions.

Wide variations emerged between respondents in the extent to which they had administrative roles within each of the trainee categories (Table 54). The most common trainee category covered

by respondents were those of Supervisors (79%) and Managers (72%), followed by Clerical (62%) and Craft/Operator (62%) categories with about half of the sample administering technician (53%) and Senior Manager (52%) categories. It would appear from Table 54 that about a quarter of respondents administered Director-level training and that Sales and Marketing was also a category having relatively little demand for administrative services. If the results of responses on administration of training are compared with the biographical information (page 33), showing the sources from which trainees come and their routes into training, then it would appear that respondents levels of administrative responsibility are higher than the management level from which they emanated within the organisation. But this is only the case up to senior management level since Table 54 shows a considerable drop between the extent of administrative responsibility between senior management and director levels. The average respondent is only acceptable administratively up to senior management level and only peripherally acceptable at director level.

This minimal acceptability of respondents for administration at director level is even more marked when we examine the second half of Table 54 on responsibility for training. Supervisory training is still a major area of responsibility at 71% but there is a larger and increasing gap between administrative and training responsibilities as we extend into the higher management levels and, markedly so, at director levels (24% to 12%). This gap is also evident at all other levels, particularly sales and marketing (36% to 21%) and commercial training (45% to 26%).

The quantitative importance of both administration and training in the supervisory area is supported in the EITB (1973) and Rodger et al (1971) researches but these researches go on to illustrate the popularity of the traditional areas of training activities: craft, operator and technician training. Management training is placed second to supervisors training in the level 1 T.O's grouping (see page 200) of the Rodger et al

(1971) research. The present research, while placing the joint craft/operator trainee in third position at 43% does so at a much lower percentage than the EITB and Rodger et al studies.

We can deduce several trends from these results: (a) respondents have a wider and organisationally higher level of administrative responsibility than their responsibility for training, (b) respondents train in areas other than their own areas of expertise, (c) administrative responsibilities, and particularly training responsibilities, decrease at the higher organisational levels.

The reasons for these conditions can only be conjectured due to the difficulties inherent in making distinctions between the two roles and because of the size of the sample but several possibilities may be suggested. The initial one is that respondents do not necessarily wish to extend their direct training activities since they believe that their major function is to cause training to happen by structuring and administering learning situations. This interpretation emerges in the section 'Roles T.O's feel that they should be performing' (page 111) and runs counter to the plea, common in earlier research literature, that T.O's were over-involved in administrative activities. The current sample appears to view administration as an activity with actual or potential controlling content rather than as a paper-processing, low status, burden. If this interpretation is accurate then there will be a move away from technical acceptance dependent on an ability in face-to-face training to an increase in the learning-to-learn skill competence. Trainers will move from the application of direct learning techniques to a role comprising the interpretation of learning requirements with management and the communication of learning techniques to line personnel so that the latter can fulfil their training obligations rather than, as frequently happens, delegate them to a professional trainer. A large measure of the success of this interpretative function will depend on the extent to which administration is seen as a supportive, 'management of

learning', function as against the negative and debilitating function of 'paper pushing'.

The emergence of T.O's who have an expectation in the area of structuring and administering learning situations, rather than that of an importer of knowledge, has important ramifications for training and possibly points to a shift in emphasis from the traditional specialist entrant who was effective in importing technical knowledge, to the non-specialist training professional whose major expectation and function is to get learning to happen at all levels within the organisation and not necessarily directly contribute to the learning situation in a narrow specialism within low-status areas. This increasing professionalism will tend to change the focus of the T.O. from a concern for the individual trainee to the needs of the organisation: a criterion for job satisfaction is likely to extend from an accentuation on trainee performance to the wider canvas of departmental and organisational performance.

Evaluation

We have already examined the rather limited extent to which the formal role of evaluation is apparently practiced (page 73) and compared it with the participation levels in other researches (page 77) but it was felt that since the gap between practice and expectation is so wide, both in evaluation literature and in the sphere of professional aspiration, it would be helpful to attempt a study of what the evaluation role actually comprises for respondents in terms of the typology of evaluation applied in given situations.

This was done by asking respondents to place a number (or numbers) in the categories grid (page 4 of questionnaire) for each category of trainee which would indicate the type (or types) of evaluation carried out by respondents for that category. The following, largely self-explanatory, types of evaluation were listed: (a) management acceptance of training, (b) pre and post tests, (c) cost/benefit analysis, (d) formal

appraisal scheme, (e) number of courses run, (f) against pre-set training objectives, (g) not evaluated, (h) other (please specify). While this listing is by no means exhaustive it appeared to have covered the majority of formal approaches since a relatively small number of respondents used the 'other' category.

No attempt was made to utilise the Department of Employment (1971) definition of evaluation ('the assessment of the total value of a training system, training course or programme in a social as well as financial terms ... it attempts to measure the overall cost benefit of the course or programme and not just the achievement of its laid down objectives ...'). This definition was felt to be inadequate for two main reasons: (a) it is a counsel of perfection since it attempts to measure 'the total value' which implies the existence and analysis of all relevant information, (b) by specifying a total systematic requirement it tends to exclude practical, if piecemeal, approaches and typologies.

The Hamblin (1974) and Warr and Bird (1970) evaluation models comprise practical procedures having application at all stages in the training cycle and provide a series of evaluation techniques applicable in each of these stages but they tend to be misinterpreted in practice as closed systems requiring an 'all or nothing approach'. It was therefore felt that the simplest method would be to utilise a series of approaches which were self defining and not necessarily interconnected, in the general belief that 'the main task of the trainer as evaluator is to test training effectiveness or to validate his professional claim that the selected training methods have brought about the desired result' (Hesseling (1966)).

The most commonly applied type of evaluation used by respondents (Table 55) was that of pre-set training objectives: this was most popular in craft/operator (30%), technician (31%) and, at lower level of support, clerical (22%) and sales/marketing (21%). This was followed by the use of the formal appraisal

scheme which had its greatest level of support at sales/marketing (21%), manager (19%) and supervisor (16%). The 'other' sub-division proved to have a measure of support in the sales/marketing (26%), manager (24%), senior manager (17%) and supervisor (17%) categories while the highly subjective 'management acceptance of training' had declining support in the manager, supervisory and sales/marketing categories.

It is possible that the increasing use of pre-set objectives as a means of evaluating technician and craft/operator training derives from the extensive use of behavioural objectives by training boards and the Technical Education Council (TEC) in technician and craft training. The paradox in this situation is that these latter objectives have been established largely for the use of educationalists and may not reflect the training requirements of individual organisations. A further difficulty is that these objectives may be unquestioningly accepted by the organisations concerned and lead to a decrease in the demand for job-related training objectives.

While it is gratifying to note that the 'number of courses run' is seldom used as an evaluation measure it is apparently a cause for concern that cost/benefit analysis and pre and post-tests are notable by their absence. Examining types of evaluation and non-evaluation (Table 55, column 7) in relation to employee categories, it can be seen from respondents' replies that the main 'not evaluated' categories are sales/marketing and supervisory training both of which are surprising since it is normally assumed that performance in the former area apparently lends itself to quantification although the supervisory category has all the traditional problems of evaluation which include: the problem of differentiating training and 'other' effects, the inability or unwillingness of employers to quantify targets, the problem of measuring (and changing) attitudes and interpersonal skill requirements.

What is even more surprising is the inability of respondents to specify evaluation techniques and at the same time apparently

claim (Table 55, column 7) that relatively few of the employee categories are not evaluated. This suggests that respondents are in fact carrying out some form of intuitive measure of their performance which informs them, however subjectively, that their training is or is not successful but their approach appears to be so far from current types and systems as to lie outside of any accepted formats.

This view is reinforced by the number of respondents, particularly in the sales/marketing (26%) and manager categories (24%), who have listed the 'other' category of evaluation without, in the large majority of cases, specifying what they mean by that term.

Similarly, it would appear that management are also engaged in this apparently sub-conscious evaluative activity or they would not, it can be assumed, be using, or possibly misusing, scarce training resources. An attempt has been made (page 58) to supply a rough measure of the comparative expectations which line management and respondents have of training but it is clear from the above that there is a great need to explore exactly how both T.O's and their managers actually evaluate training and the extent to which the expectations of T.O's match, or otherwise, those of line management. It would seem from this and other research (Pinto and Walker (1978)) that a considerable amount of training activity is taking place in industry and commerce as an act of faith. The problem is not the generally assumed one of 'why do T.O's evaluate training?' but rather what types of evaluation do both managers and trainers actually use and find acceptable and to what extent do these measures fulfil expectations.

The attempt to measure the extent of the movement in the use of types of evaluation illustrates some perceptible changes in the use of varying types over the three year period: there is a trend to a decrease in the 'acceptance' approach in the manager (17% to 5%), supervisor (16% to 9%), sales/marketing

(11% to 3%) and clerical (10% to 5%) categories. There is an increase in the use of formal appraisal schemes in three important categories: sales/marketing (3% to 21%), manager (9% to 19%) and supervisor (7% to 16%). The numbers involved in these changes and the changes themselves make any attempt to the formation of a meaningful pattern highly tentative but it would seem that a minority of respondents have moved towards increased objectivity in the measurement of their effectiveness as trainers, particularly in the sales/marketing and manager categories, although there is little discernible change in the 'not evaluated' group.

An attempt was made to relate the type of evaluation used to the size of the organisation. This was of limited value and failed to illustrate any pattern of techniques usage but did show that pre and post-course tests and cost/benefit analyses were not used in the 300-599 and 600-999 groups and seldom used in the 100-299 group. These techniques were not popular in any of the six groupings but their complete absence from the two smallest groups could possibly be explained by the supposition that relatively sophisticated monitoring techniques are less likely to be available in smaller, and therefore possibly more informal, organisations.

Determinants of Training Needs

Training literature and research projects on training roles usually give primacy of place to the T.O's role as an assessor, or identifier, of training needs, although researchers (e.g. EITB (1973)) recognise that this role is neither universally accepted by participants as a major area nor uniformally implemented (see page 199). The phrase 'assessment of training needs' is used in this context to cover the activities involved in the definition of training needs at organisational level as a prerequisite to the distribution and utilisation of training resources (Boydell (1979)).

Since there appears to be little evidence illustrating the

content of the assessor's role which goes beyond prescription it was considered that an attempt should be made to discover the types of criteria which respondents use in carrying out in their interpretation of this role. This was done by presenting them with twelve determinants and asking respondents to indicate those used in practice in the current year (Table 56). The opportunity was also taken to examine the ways in which the use of these determinants had changed since three years ago to get an indication of role mobility.

The determinants used appeared to give respondents an acceptable range of criteria since only four completed the 'other' column, using the following factors: T.U. pressure (1), brainstorming with managers (1), succession plan (1) and 'ad hoc' based on the ability to persuade managers to support courses (1).

The most popular determinant in the assessment activity were the specific demands by manager (78%) or a joint manager/T.O. decision (72%). The increasing use of appraisal procedures in industry would appear to be the reason for the relatively high rating of appraisal schemes (69%) as a source of training needs. The need to comply with statutory obligations is reflected in the use of safety training requirements (74%) as a major determinant in assessment activity and also 'legislative requirements' (69%), while Training Board requirements only account for 40%. It is of interest to note that less than half of the sample (47%) developed their own criteria either as a policy decision or, more likely, by default. The application of corporate-level criteria, while only 40%, appears to illustrate the limited use of respondents as a focus for the attainment of organisational objectives.

This latter factor is also a relevant change over the three year period going from 29% to 40%. The apparently enhanced relationship between management and the T.O., or at least the acceptability of the T.O., seems to be underlined by the trend towards the joint assessment of training needs by management and T.O's (from 48% to 72%). Table 56 also illustrates the

increasing tendency to use appraisal schemes as a source of training needs: offering the opportunity for training which is more likely to be related to job performance. The use of the training function's potential for assisting in the solution of organisational problems appears to be growing (41% to 57%) although the expansion (29% to 47%) in the use of the T.O's decision-making role in the determination of training requirements could either be viewed as a welcome trend towards the extension of the T.O's role in organisation-level decision making or a tendency for management to delegate (or abdicate) their responsibility: the above noted trends towards joint assessment and the use of training for the fulfilment of appraisal-based needs would appear to support the increasing acceptability of respondents by managers over the three year period. The greatest areas of change over this time period derive from external legislative pressure (e.g. the Trade Union and Labour Relations Act (1974), Employment Protection Act (1975)) to fulfil statutory requirements (40% to 69%) and, specifically, to meet safety training requirements which may be due, at least in part, from the changes in employee liability resulting from the Health and Safety at Work Act (1974) and the duty which the Act places on employers to supply training for their employees (Part 1, Section 2). This use of legislation, which has as an after-effect an increase in the demand for training, may generate a backlash against training in the longer term for two main reasons: (a) training may be viewed as a defensive activity forced upon reluctant employers with trainers becoming quasi-government agents used to carry out enforced training, (b) training activities resulting from legislation will tend to be designed to meet broad governmental rather than specific organisational needs and may result in the application of externally-based evaluative criteria which could prove damaging to the training function.

Training Techniques

Respondents were given a list of ten types of direct training techniques and asked to indicate those used at the present time

and three years ago (Table 57). The purpose of this listing was to find out the extent to which respondents actually applied the type of techniques which it is normally assumed that T.O's use in the direct training situation so that trainee T.O's can be helped to develop techniques which they will find to be both relevant and acceptable. It was also hoped to map the mobility of T.O's in their use of training techniques over a period of time to determine the ways in which changes in categories trained (page 121) create a demand for the use of new techniques or the increased use of techniques in current use.

The present study has indicated a movement over the three year period towards a greater involvement in management-level training: will this movement tend to generate a similar trend towards the increased use of training techniques normally associated with this level of training? An examination of Table 57 indicates a strong adherence to the lecture approach in training and appears to supply a paradox in that moves towards increased management training are often associated with a high degree of participation and self development rather than formal lectures. The limitations of the lecture technique are well illustrated in educational literature (Beard (1976)): passive learning, lack of feedback, limited interpretation of subject matter. But against this it can be argued that there is a growing efficiency in lecture methods: large groups are covered simultaneously and economically; opportunities exist for the pre-structuring of objectives, analytical exposition and the modification of the pure lecture format.

In the present context lecturing appears to fulfil the teaching requirements of respondents (although there is no way of knowing the effect on trainees) wishing to transmit learning material in the formal learning situation but it may also be used by trainers as a defence mechanism in situations where they wish to speak, or be accepted as speaking with, authority on a subject, since the absence of feedback protects trainers from the possibility of a threatening situation of the type

which may arise in the less popular informal instruction situation. The latter has a 66% response rate compared with the 83% for lecturing. However, it is possible that respondents may be called upon to make formal lecturing inputs into training programmes where the trainer's function may be to initiate a training exercise by making broad factual statements, e.g. the training implications of a new piece of legislation.

Table 57 also illustrates that while participative techniques are not as popular as lecturing, they are nevertheless well supported. Seminars and discussion groups had ratings of 72% and 64% respectively: suggesting the use of the trainer as a 'pump primer' stimulating and structuring training without necessarily becoming actively and continually involved in training activities. The use of case studies (55%) and role play exercises (45%) had marginal support but simulation (7%) and buzz groups (5%) were only used by a small minority while interactive techniques were utilised by a third of respondents.

The comparison of the training techniques used in the one year period with those used over three years shows a distinct move towards the increasing use of interactive techniques (17% to 33%): this may become an area of expansion as respondents and their colleagues become more adept and confident in the use of these sensitising techniques. The only other changes of note over the one and three year time spans were the extensions in the use of seminars (from 60% to 72%) and discussion groups (43% to 64%), possibly reflecting the move into more management-level training, and a trend towards the greater use of training projects (38% to 55%).

The above changes over time towards the greater use of training techniques associated with management-level training would appear to support the assumption that changes in categories trained are reflected in the changed pattern of direct training techniques used by respondents.

Budget Determinants

It was originally intended to ask respondents the open-ended question 'how is your training budget determined?' so that an insight could be gained into the mechanics of budgetting for training and the ways in which financial resources are allocated for training activities. But it was felt that the answers to this question would be so diverse as to make any comparisons difficult, if not impossible: a problem encountered by Rodger et al (1971) in their open-ended interviews at the early part of their work with T.O's. A workable compromise appeared to be the presentation of eight broad budget determinants which respondents could tick as representing the situation relevant to their organisation. This approach has two obvious weaknesses: (a) it fails to supply the actual criteria on which finances are allocated and, (b) it does not tell us the methods used for determining the quantity of finance allocated to training.

However, the responses of T.O's to the statements presented in Table 58 indicate the respondents' perceptions of how management actually approach the allocation of budgets to training activities.

It has been argued (Cyert and Marsh (1963)) that the reality of where an organisation sees its priorities is contained in its budgets: although in practice there may be a tendency to relate budgets to historical factors, for example, a tradition of training craftsmen. Theoretically, (Black, 1967), the budget of an organisation is planned in relation to its goals and resources and communicated to budgetting centres where it is applied, analysed and monitored to compare actual performance with planned expectations.

Recent trends (Caplan (1975)) accentuate the participative approach to budgetting where those in charge of budget centres are encouraged to take the initiative in the definition of their budgetary requirements as one means of increasing their sense of responsibility and enhancing their performance, although

there is no guarantee that positive outcomes will necessarily result: some managers (and T.O's) may be tempted to set low and easily attained targets; budget levels may be set according to the personality of the recipient rather than actual needs; there may be an even greater tendency on the part of senior management to accept budgetary requirements from line managers offering an apparent, or short term, advantage over those of service areas, particularly that of training, as can be seen from the decreases in training activity which follow economic downturns.

The position of the T.O. as a recipient of financial resources can be made difficult by the nature of his function: training costs are, as Talbot and Ellis (1969) illustrate, extremely difficult to isolate and categorise and few organisations appear able to apply the procedure of relating costs to trainee categories (Garbutt (1969)) or utilise cost benefit analysis as an evaluative or decision-taking tool in the area of training (Hall (1976)). The T.O. is therefore confined to a situation in which there is general agreement that his aim is to reduce learning costs while there is wide acceptance of the view that training costs are extremely difficult to define with accuracy within an organisation. Given this situation the main aim of this part of the survey was to attempt an assessment of the extent to which respondents' budgets were: (a) imposed, (b) mutually agreed or, (c) supplied on demand.

The majority of respondents (62%) structured their own budget and have it agreed by management (Table 58): joint assessment with management is undertaken by 26% of respondents. A large minority (36%) derive their budgetary requirements from a training needs analysis and 22% have a training budget which is a sub-division of a personnel budget. Only 10% have their budget presented to them without prior consultation while 18% are supplied with finance as it is required. No respondents use their Training Board requirements as a determinant of their budgets and only 3% sub-divide their budgets according to category of trainee.

While it may appear acceptable that a majority (62%) of respondents structure their training budget and then get it agreed by management the basis on which this agreement is reached seems questionable when it is considered that only a third of respondents derive their budgets from a training needs analysis and little attempt is made to even relate budgets to categories of trainee (3%). This suggests a high reactive element in the determination of respondents' budgets rather than the development of budgetary requirements based on present and mutually agreed criteria related to present and future manpower requirements. The low level of joint assessment with managers (26%) and an apparent independence from personnel budgets (78%), reinforce the view that respondents largely take the initiative in the determination of their budgets rather than actively participate with their managers in the structuring process. The extent to which finance is supplied as required (18%) further underlines the reactive nature of training budgets and could suggest either a large measure of trust in the professional competence of respondents or, conversely, an inability on the part of management to project and coordinate their budgetary requirements: budgetting by default. But the responses to budgetting determinants in this study offer a much more optimistic picture of the plight of T.O's in the budgetting context than that emerging from the EITB (1973) study: only 40% of respondents had a responsibility for their department's training budget.

In answer to the three questions set above we can therefore state that: (a) respondents did not generally perceive budgets as being imposed upon them, (b) budgets were normally mutually agreed by a majority of respondents and their managers and, (c) only a minority of respondents had finance supplied without the prior agreement of managers although the demand for finance often appears to originate from respondents rather than their managers. A useful extension of this approach to the determination of training budgets would be the investigation of the procedures adopted by organisations through which training budget levels are determined: to what extent is it the result

of deliberations based on clearcut financial criteria; an outcome of organisational powers politics (what are the T.O's counters in the power game?); facile agreement reached on a 'what the market will bear'; or simply the extension of historical budgetary allocations?

Relations with Training Boards

It is generally assumed that legislation on training can only be successful if those implementing it can establish good working relationships with their counterpart in industry and particularly with management. No large scale attempts have been made to determine objectively the extent to which training board personnel have been successful in their attempts to establish effective working relationships with managers in their industries although evidence does exist in literature and research projects, Mukherjee (1970), Hartley (1976) MSC (1980), illustrating the extent to which training activities have accelerated since the operation of the 1964 and 1973 Training Acts.

While it is impossible to ascertain the extent to which training legislation and board personnel have contributed to this growth and the development of a supportive environment for change it could be argued that there is a causal relationship which could only have resulted from an acceptance, albeit in some cases reluctant (Bury (1971)), of ITB policies and the establishment and development of working relationships between training board personnel and managers in industry. But there is a general and persistent view in training literature that the relationship between training board staff and management is at best an uneasy one and that it affects the potential for a growing acceptance of the training function and training personnel. Among the factors affecting this relationship are: the 'poacher-gamekeeper' relationship spawned by the early levy/grant system (Forrester (1968); the tendency for training boards to over-specify training requirements or make recommendations and forecasts on training resource allocation (Hartley

(1976)) which were only relevant for larger organisations or at a particular point in time, Mukherjee (1974); some company specialists (MSC (1980)) still view training boards as massive 'bureaucratic watchdogs', with over-stringent advisers, more interested in social goals than the offer of practical help to individual organisations.

The large-scale EITB (1973) survey echoed the concern of managers and training specialists about the degree of ITB rather than organisational orientation in the design and implementation of training requirements and stated, "the present band of T.O's appears largely to reflect industry's response to the 1964 Industrial Training Act, for their main role appears to be primarily that of liaison with the industrial training board".

However, there is little researched evidence which points to a general hostility on the part of training specialists to training boards or their staff within organisations in the context of training, as against administrative, activities. This viewpoint is borne out by the lack of any anti-ITB bias among respondents in the well-researched work of Rodger et al (1971) and even in the limited non-statistical survey carried out recently in 50 companies (MSC (1980)) in which only a small minority favoured the scrapping of training boards.

It was therefore considered important in the context of this survey that not only should the job of the T.O. be examined in terms of roles involving training boards in the areas of making grant claims (page 73), liaison with training boards (page 63) and the attitudes of respondents and their managers to training boards (page 65) but that an attempt should also be made to determine the relationships which existed between: (a) respondents and training board staff and, (b) management and training board staff, as perceived by respondents. This was done by asking respondents to tick one of three boxes comprising 'cooperative', 'apathetic' and 'hostile'. There was a total of 46 responses in this area with 3 missing responses and

9 respondents from organisations not covered by training boards.

A very large majority (98%) of respondents (Table 59) described their relationship with training board staff as 'cooperative' with only 1 respondent having a hostile reaction. The relationships between management and training board staff were much less clearcut with 74% having a cooperative relationship, 13% apathetic and a similar level hostile.

This level of cooperation between training board staff and both respondents and their management does not necessarily imply support for training boards or their policies - a point which is well illustrated in the attitudes of respondents and their managers to the concept of training boards (Tables 15 and 16) - or even serve as a measure of the importance which respondents place on content and quality of training board recommendations - but it does imply a high level of success on the part of board staff in their personal acceptance at grassroots level, particularly with their counterparts in organisations. However, respondents are still conscious of a large minority of managers (26%) who are either apathetic or hostile to training board staff: a fact which underlines the importance of the T.O's role as 'man in the middle' in what is still a contentious area seventeen years after the passing of the 1964 Industrial Training Act.

Respondents were also asked to list the main changes in their relationships with training boards as a means of getting an indication of possible changes affecting this relationship over the past three years. This was done by asking respondents to make open-ended comments on these relationships which, while difficult to compare and evaluate, could nevertheless help in the development of an overall picture of the changing tripartite relationship between training board personnel, the respondent and his management.

Reactions to this question varied considerably and there was

little accord on areas of change. The increasing development of personal links with training board staff figured strongly in a number of replies; respondents commented either directly or obliquely on their greater willingness to use training board expertise and the increasing profit orientation of training board staff with a consequent relevance and sensitivity to organisational requirements. Respondents also commented on the increasing non-judgemental approach of advisers and the trend towards a democratic relationship between advisers and their counterparts in organisations. There was a total absence of any indication of deteriorating relationships over the three year period.

An important determinant in their formation of early views and subsequent relationships to training boards was the activity of grant maximisation in which some companies simplistically equated the training levy with training costs, rather than as one factor in the total cost of training, and used their grant repayments as a measure of the effectiveness of their training activities (Forrester (1968)). It was therefore felt necessary to insert a further question in this section to obtain the reactions of respondents to the ways in which their organisations were orientated to grant maximisation. This showed (Table 59) the existence of a considerable measure of support for the grant maximisation viewpoint: 24% of respondents believed that their organisation had a strong orientation to grant maximisation; 43% were marginally oriented and 33% were not interested in grant maximisation.

These results illustrate the existence of a large percentage in the, admittedly small (n = 46), sample who either use an externally structured set of industry-based criteria as a norm to measure the success of their organisation's training requirements or view these external criteria as of at least marginal significance in the measurement of the effectiveness of their training activities: only one third of the respondent's organisations appear to feel sufficiently competent to base their training needs on self-determined criteria even at a time

when levy payments are decreasing and becoming minimal in the context of total training costs (MSC (1980)).

It would seem that the Training Boards are unwittingly supplying organisations with criteria which is open to an over-simplified misinterpretation in the determination of actual training needs within individual organisations and that broad advice is being accepted as a compulsory requirement. This reflects strongly on the willingness of organisations to use the professional advice of their training personnel, or on the ability of those personnel to supply training activities which, while utilising relevant training board recommendations, primarily meet organisational needs.

O.D. and Training

One important decision which trainers of T.O's must take is to decide the extent to which their courses should be orientated towards an O.D. approach to training: should it be seen as one of a series of options or is it a fundamental part of training philosophy and subsequent course design? We have already discussed (page 116) O.D. approaches to training and examined the difficulties in both the definition of its contents and the problems related to its introduction and use: these factors are explored by Thakur et al (1978) in the context of the personnel function and in Tranfield and Gill's (1972) study of the application of O.D. in industrial training situations. While there is certainly a multiplicity of literature on the applications and potential uses of O.D. as a strategy for the determination of training requirements and as a means of fulfilling these needs; there would appear to be little evaluative evidence illustrating the extent to which it is used by training specialists or measurement of the reactions of O.D. users to its application in the learning environment.

Since O.D. is often considered to be an important activity, either currently or potentially, for T.O's, a question was inserted to determine the number of respondents' organisations

using O.D. and also to gain an insight into their views of the achievements and limitations of O.D. in the training context. A large minority (36%) of the sample (Table 60) had experience of the application of O.D. in their organisation with a preponderance of respondents in the large organisations (2000+): of the 23% of the total sample in this size of firm grouping a total of 14% were users of O.D. Every other firm grouping had a higher percentage of non-users than users: this was particularly marked in the small firm grouping where only 2% of 13% were users.

A total of 9 out of 55 respondents answered the second part of the question ('list the main achievements and/or limitations in the training context'), of this group 5 reacted favourably to the application of O.D. techniques in their organisation. This positive reaction to O.D. comprised a series of statements stating why O.D. had contributed to the effectiveness of training and included the following: the use of O.D. in the context of self-directed management of learning for middle managers; to generate other organisational training activities including the self identification of training by groups of management staff; achievement of acceptance by T.O. through the opportunities which O.D. provided for practising managers to work for the development of organisational change through the medium of project groups; changing the function of a respondent from the mechanistic activity of course provision to the implementation of participative and continuous learning in the organisational context.

The neutral or negative viewpoints may have originated in the misuse of O.D. as much as from its application but the views expressed varied from a vague feeling that O.D. techniques helped supply a general over-view of organisational training needs and possibly resulted in renewed expectations from the training function, to the more hostile reactions which concentrated on the protracted, time-consuming and expensive nature of O.D; its effects as a source of organisational 'politicing'; the unrealistic expectations which it generated,

especially in the area of promotion; its inability to produce a training by-product.

It would appear from the above, and considering the relatively small proportion of the sample actively participating in the O.D. role (Table 60), that there is a minimal use of O.D. concepts within the sample. This view supports that emanating from the thorough, if limited, findings of Tranfield and Gill (1972) on the participation of T.O's in what is normally considered to be an external consultancy role. This viewpoint is substantiated by the ASTD (1978) research in which O.D. is not mentioned in the top 25 roles (Table 2) and the O.D.-orientated training techniques of sensitivity training is ranked in the bottom 25 items of trainers roles (Table 3).

There is also the danger in any O.D. input into a T.O. training programme that it will generate unreal expectations in the participant's organisational environment with a subsequent demotivation and the possibility of a negative and 'threat' reaction from management-level personnel when O.D. concepts are originated, introduced and applied by the T.O. It has also been argued, with some considerable justification (Rodger et al (1971)), that to view the average T.O. in an O.D. role is to 'over-sell' the role since the T.O. role is essentially "a means of making better use of human resources in the organisation by developing people to meet the requirements of the job to be done", and as such it is one of a series of options or specialisms which the organisation can use to solve manpower problems.

The T.O. is not a human resource specialist but a training specialist and if the T.O. performs the, often rather exotic, O.D. roles of 'catalyst', 'consultant' or 'change agent' he is going beyond the roles normally expected of a T.O: roles in which there is no objective evidence to suggest he would be either competent to perform or acceptable in terms of organisational expectation. However, the T.O. must know the basic

concepts and limitations of O.D. and how O.D. is applied in practice so that he is capable of participating in training activities emanating from its application.

SECTION 3

RESPONDENTS' TRAINING ACTIVITIES

Middlesex Polytechnic T.T.O. (Introductory) Course Objectives: Fulfilment and Relevance

Since the main concern of this study ~~is~~ WAS the training implications of changes in the job of respondents, it was considered necessary to compare their evolving expectations within their changing organisational environment with those of the introductory course in order to gain some insights into the extent to which the course prepared them, or failed to prepare them, for their initial activities and later requirements. The aim of this part of the ~~section is~~ STUDY WAS, therefore, threefold:

(i) to check the extent to which the T.T.O. course objectives were fulfilled,

(ii) to determine the extent to which respondents considered the objectives relevant after a minimum period of time (three years) in the training function and,

(iii) to help determine the training implications of changing expectations likely to be encountered by new T.O's during and after their initial training.

The basis for this part of the study was the 14 main objectives of the course which have remained largely unaltered within the time period in which the respondents attended the course, although accentuations and training methodology have changed, e.g. a greater accentuation on 'learning by doing' and interactive skills.

The main limitation of this approach in which respondents are asked to indicate in a 'yes'/'no' type of reaction is that while it indicates preferences and the fulfilments and limitations of initial training, it does not give any clues as to the criteria which is used in indicated areas or the extent to which there has been fulfilment or relevance in the preparatory

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training period in terms of later requirements. Further, while it gives a broad validation of course objectives, it does not allow for the definition of course objectives which could have been more usefully set in terms of the respondents perceived requirements. But even with these limitations, it serves as a base from which to help determine the training implications of changes stemming from real situations.

The first finding which emerged from this part of the study (~~Table 61~~) ~~is~~ WAS that no course objectives were completely fulfilled or totally relevant to all respondents. The greatest degree of general fulfilment was perceived in the areas of 'acceptance' (50 out of 53 respondents) and, to a lesser extent, 'preparation of training programmes (45 out of 53); 'state characteristics of systematic training (43 out of 50); the 'assessment of training needs', 'identification of individual training needs' and 'undertake a training analysis' also had a similar level of support. The least fulfilled objective, by a large margin, was the major one of 'validation and evaluation' with 25 respondents having their requirements from this objective fulfilled but with 26 unfulfilled respondents. This was followed by the assessment interviewing (18 unfulfilled and 35 fulfilled) and the identification of motivational needs (15 unfulfilled and 36 fulfilled).

The responses to the relevance or irrelevance of objectives tend to follow those on fulfilment: the 'acceptance' factor and the 'preparation of training programmes' heading the list with the support of 51 and 49 respondents, respectively. But the surprising element in this comparison was the content of some of the objectives considered to be irrelevant by a large minority of respondents. The objective considered most irrelevant was that of 'distinguishing types of training functions in organisations'. The justification for this objective, which was only supported by 31 of the 50 respondents, was that T.O's should be able to gauge the level of developmental activity attained in an organisation using a 5-point scale: (i) all organisational training stems from defined corporate objectives

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P.T.O.

and fully co-ordinated, (ii) training carried out at all levels and based on assessed and analysed requirements but not co-ordinated, (iii) training undertaken sporadically but at all levels, (iv) training activities limited to craft and operative categories and, (v) no formalised assessment or analysis undertaken and training largely limited to attendance on external courses.

Further objectives considered by large minorities to be irrelevant were those related to validation and evaluation (16 irrelevant and 33 relevant) and assessment interviewing (17 irrelevant and 36 relevant). The problem which emerged, particularly in the interpretation of the large minority who found the objective on validation and evaluation irrelevant, is that of determining the nature of the irrelevance. Was it due to an over-accentuation on 'models' which may have proved misleading or over-complex for practical application, or, and this seems a more likely interpretation, were respondents not given the basic information necessary for the establishment of validation and evaluation criteria in their organisational environment? A further possibility is that the type of activity contained in validation and evaluation sessions on the course were not required or expected in the grassroot training situation.

A further area which was considered by a number of respondents (8) to be irrelevant was that of 'instructional techniques'. This finding is in line with the general lack of support for the direct training role in the top 20 role areas in which it was the bottom role with 53% support.

It would appear from the results shown on Table 61 that the majority of respondents found the course objectives to be both fulfilled and relevant in the context of their post-course experiential development. But there were areas of the course in which the objectives are generally accepted as being essential for practising T.O's in which objectives were not being fulfilled or not seen as relevant by a large minority of ex-course members. The major areas requiring examination

are those of: validation and evaluation; the objectives and content of instructional techniques; assessment interview and the distinguishing factors of training functions. However, these reactions of respondents to the course objectives only supply a partial answer to the possible developmental needs of respondents and T.O's in general since they are the reactions to pre-set objectives and do not in themselves supply the information necessary as to the need for other objectives or the degree to which objectives were fulfilled and relevant. In effect this part of the study extends the validation of the course content but does not fully evaluate it.

This apparent fulfilment of requirements is itself a cause for concern, particularly when the wide range of variables involved in the training of T.O's are considered. How is it possible to meet the training needs of a group of Training Officers having a wide disparity of experience, ability, attitude and motivation and coming from a variety of industries and types of organisations? Added to these factors is the difficulty of establishing and applying objective selection criteria, although most of the respondents were involved in pre-course briefing exercises in which both their requirements and those of their organisation were established and agreed, albeit within the limits of comprehension of the potential candidates and their managers.

One possible answer to the above question is that the course objectives as they have developed from the original C.T.C. recommendations (page 198) have been so broad and general in their content as to meet the apparent needs of all comers or at least the demands made on them by their organisation and particularly the Training Boards. This also raises the further question of the extent to which we can categorise training as a profession (Lippit (1969)) when the learning requirements of participants can apparently be met by an 8 week introductory course reinforced by subsequent work experience and attendance on a series of short courses. This apparent satisfaction with current training may well have resulted from the confused

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situation which prevailed after the introductory course was first developed in the middle 1960's when the statutory-inspired demand for T.O's was initiated and the training function was rapidly and formally changed from a traditional operative/craft level, low status, function to an all-pervasive set of training roles in which T.O's, initially trained to these low-level expectations, were increasingly expected to not only train extended categories of trainee but also encouraged in the training literature of the day ~~(see page 141)~~ to enter the fields of consultancy and O.D. at a time when the limited research then undertaken pointed to a need for the effective implementation of basic, if conventional, role requirements against a background of grudging managerial acceptance.

The natural outcome of these pressures on the first wave of entrants into the training function was a reactive one in which the interpretation and fulfilment of grant-maximising requirements, were often met by the formal structuring, administration and implementation of training board recommendations. These possibly covered the needs of the industry but in their over-simplified and generalised form, could hardly be expected to fulfil the complex and differing needs of individual organisations. A paradox of training legislation is that we have attempted by financial manipulation to attain behaviour changes in organisations through training: changes which can only result from the willing acceptance by the organisation and its members of the need for such change. It could be argued that we can realistically initiate training activities through statutory enactments but it is doubtful if we can, in the long run, establish or sustain effective training activities by this means without undermining the roles of T.O's and diminishing their acceptability as a viable service function.

~~However, recent governmental proposals, if fully implemented, should make a positive contribution to the initial training of T.O's.~~ The 'core competency' concept of the MSC ~~(page 162)~~ and the suggested code of practice will help meet the urgent need for a uniform and co-ordinated approach to the training of

new entrants into this field while still allowing for diversity in approach where it is merited. This suggestion of what in effect combines peer assessment with a form of national accreditation based on core competency requirements should help bring some semblance of order into a field where wide diversity has been commonplace. One difficulty which emerges from the document but which does not affect the logic and practicality of the final hypothesis on identifiable role elements, is that of whether or not there should be an accentuation on professional or on specific job requirements. The document comes down on the side of job orientation and concentrates on the present job and the organisational requirements of new T.O's as against potential developmental needs and job flexibility, arguing rather paradoxically, that "there is no one set of core competencies common to everyone" yet defines "common areas of know-how" and "specific practitioner skills, knowledge and techniques needed by any one training specialist in order to carry out the specific tasks for which he or she will be responsible".

Post Introductory Course Training

An important additional requirement to the views of respondents on the relevance and degree of fulfilment of introductory course objectives was that of examining the ways in which respondents perceived their training needs after the course. Respondents were, therefore, asked to indicate from a list of 37 course areas (Table 62) the courses they attended since leaving the introductory course, whether the contents were relevant or irrelevant and future requirements. But since formal training courses are only one of a series of options in which respondents could increase their expertise, a further 6 items were added: planned work experience, guided reading, research, visits to other establishments, project work and secondment.

A major limitation of this approach to the determination of training requirements is that while it gives an indication of

areas in which training needs have been perceived by respondents, it fails to show the width or depth of the required fulfilled or projected courses or the criteria used by respondents to justify their choice of subject. Course runners will also be aware of the situation in which course attenders have been perfunctorily sent on courses either because it was felt by management that they required it or that other employees were unable or unwilling to attend. The respondent may also have been sent on a course to check the relevance of the course to present or future organisational requirements. In addition, course content which is related to the perceived requirements of respondents may not necessarily relate to those of the organisation.

~~Table 62 illustrates the top 20 post course training areas and the top 10 of future training requirements.~~ The greatest single course subject area in which respondents were engaged was that of Safety (50%), followed by training requirements stemming from the recent spate of employee-orientated legislation with a 47% response rate for 'employee legislation' and 40% for 'industrial relations'. It is of interest to note that the top 3 subjects relate to employee-centred, rather than organisational, requirements and could have their roots in externally induced compulsion. It could also be argued that they are not strictly requirements for T.O's but are a requirement for most of the functions within an organisation although they are naturally channelled through the trainer and therefore seen as a legitimate function of the T.O. to disseminate, if not to implement, although responsibility for creating learning conditions for a subject within an organisation such as safety, and responsibility for safety, may lead to responsibility by default especially if there is no clear cut focus for a function, e.g. a Safety Officer.

Two of the next 3 areas listed (Management Training (38%), Interviewing (38%) and Appraisal (34%)) may also be considered as not strictly or uniquely related to the training function: the relative importance of interviewing and appraisal may just

as well relate to the broader manpower resourcing function of personnel as to that of training and the level of importance given to these functions may well reinforce the point ~~made on page 12~~ that respondents are in effect extending their activities into this area.

The activities related to the development of respondents which were learning strategies unrelated to courses did not appear in the top 20 listing with the exception of 'visits to other establishments' which had the support of 29% of respondents. There would appear to be a disappointing lack of action-centred learning activities.

The first 3 items in the top 10 of future training requirements contains course areas which largely coincide with those of the top 20 listing of courses attended, with Industrial Relations now top (24%), closely followed by Management Training (22%) and Employee Legislation (21%). This accentuation on legislation-based training requirements is continued from the pattern which emerged from the earlier courses attended but at a much reduced level of demand as apparently one-off requirements, such as Interviewing and Appraisal, have been met and are presumably being acted upon. Further areas, such as Management Training and, to a lesser extent, Counselling and Manpower Planning, appear to be perceived as areas of a continuing training requirement possibly due to their intrinsic difficulty and, particularly in the case of Management Training, because these areas call for skills beyond those normally required by a T.O. Rodger et al (1971) have argued that management training requires a level of 'people' or organic skills which differentiates it fundamentally from the more mechanistic or procedural skill requirements common in such areas as operative, craft and technician skill requirements and, therefore, "demands more sophisticated behavioural science knowledge and techniques from the trainer than does other kinds of training". These distinguishing factors are well illustrated in the management training requirements detailed

in management training studies such as Taylor and Lippitt (1975) where the complexity of techniques and the level of implementation are normally beyond those associated with practising functions of the 'generalist' T.O.

The replies to the question on the relevance of post-course training showed an overwhelming measure of support for the training received: the highest levels for irrelevance were in the Psychology course area within which 30% of respondents who had received training in Psychological Testing found it irrelevant to their requirements: 78% had a similar reaction to Learning Theory, a notoriously difficult subject to teach practitioners in a manner which is likely to be relevant to, and applicable in, their organisational environment; as Jones (1980) points out: "Training practices rather reflect ad hoc applications of (learning) theory on the basis of 'if it works, use it'".

Respondents have participated in a wide range of course areas with attendance on a total of 457 courses, an average of 7 courses per respondent, and expect to attend a further 167 courses in the future. The survey failed to establish any pattern of course attendance in relation to size of firm. For example, the present and future demand for training in the area of Industrial Relations tended to be roughly similar in each of the firm size groupings. But there was a considerable variation in the demand for Safety training between the smallest firm grouping (7 out of the 8 respondents) and the largest firm grouping (4 out of 14 respondents) which may be due to the greater likelihood of a Safety Officer with a Safety Training remit in the larger firms.

There was a

~~What is of particular interest in this part of the study is~~ the lack of demand for, and apparent interest in, the key areas of job training analysis and evaluation: only 12% of respondents have had post-course training in job training analysis, 3% in cost-benefit analysis and 10% in evaluation. These areas all show a decreasing percentage in terms of future

requirements with the exception of cost-benefit analysis which rises from 3% to 9%.

A further cause for concern ~~is~~ was the implied interpretation of course members that they have met most of their needs in an introductory course, even given the relatively high number of courses attended by respondents since attendance on the introductory course. This is despite the measures which course runners have taken (DES, 1971), and continue to take, to underline the point that the content of such courses only serve as an introductory preparation to a complex, multi-faceted job. One possible interpretation of this situation is that the contents of introductory courses do actually meet the limited perceptions of respondents and their organisations and that a fundamental need is, therefore, to widen the perceptions of client organisations to the potential contribution of the training function so that the existing knowledge and skills of the T.O. are utilised and future needs are exposed and identified.

Another possibility is that the above interpretations of the past and future training requirements of respondents have largely rested on the assumption that a T.O's training requirements necessarily relate to the sphere of training, when they are, in fact, needs which relate to the broader function of human resource, or personnel, management. For example, the continuing demand for training in industrial relations, employee legislation, manpower planning, counselling and the handling of conflict could just as logically relate to training needs generated by T.O's moving from a training to a manpower resourcing function.

SECTION 4

CONCLUSION

Any conclusions which are based solely on a limited sample of T.O's must be treated with caution. However, when the results of this research are used in conjunction with those of earlier studies it is possible to arrive at conclusions which justify action or point the need for further investigation.

Respondents and their Organisations

The training profession appears to be failing in its attempt to recruit younger members. This situation was underlined in the earlier research of Rodger et al (1971) in which the average age of entrants, in this relatively new profession, was 42 years. A similar situation emerged in the EITB (1973) research where there was a broad peaking of respondents in the 40-49 age band. This conclusion is also reinforced by the Bath University research (Frank (1975)) where only 33% of respondents were under 35 years. The present research is in broad agreement with these findings and corresponds closely with those of the EITB. The trend would appear to be reversed in the ASTD research (Pinto and Walker (1978)) in which 64% of respondents were under 45 years but this could be explained to some extent by the bias ~~in this research~~ of returns from younger respondents ~~and~~ noted by Pinto and Walker.

These findings on the age levels of practising T.O's have two important implications for the trainers of T.O's. First, a majority of those being trained are likely to come within Belbin's (1972) category of the 'older worker'. If this trend continues we may find ourselves in the paradoxical situation of attempting to generate change - a central feature of the T.O's job (Perry (1972)) - by using personnel who, as a generalisation, are more likely to be resistant to change.

Second, while many of the entrants into training in both the Rodger et al and EITB studies were recruited from instructor-

grade personnel, there has been a trend in the present research towards the use of management-level nominees in training jobs. This may result in training being viewed as a post-management activity rather than as part of a strategy for management development. The recruitment of managers into training may have the credible effect of placing management-related personnel in the training function but could also have an adverse effect by implying that training is a soft option for end of career managers.

If we accept Belbin's age-related factors in training then we are likely to be re-training older employees who are likely to be losing status in their move into a service function and who may additionally feel threatened in a learning environment with younger, possibly academically trained, fellow trainees. It is essential that the implications of such an age and experience 'mix' are taken into consideration in the design and implementation of T.O. courses and that discovery methods of learning are used to minimise stress.

Training and the Personnel Function

Attempts have been made in the literature on training to view training and personnel as facets of a wider and relatively homogeneous human resource development function. Writers, such as Johnson (1976), have extended the function of the trainer into such areas as manpower planning and the use of cost reduction techniques as well as the less contentious areas of the selection, recruitment and appraisal of staff. While the personnel function had a high rating as a source of previous experience in the Rodger et al and EITB researches, neither argued the case for extending the function of the T.O. into that of a personnel specialist: Rodger et al argued that training is one of a series of options open to management for extending the effectiveness of their human resources. But other researchers (Frank (1975), Pinto and Walker (1978)) have shown that training activities tend to lead towards an interest in, and a demand for, expertise in personnel-related

activities, particularly those of recruitment and selection.

The present research underlines the trend for individuals who enter the training function to develop over the three year period towards the personnel function and supports the finding by Frank (1975) that T.O's may begin with a purely training function but will tend to develop to the point where they will aspire to personnel roles and will therefore require a background knowledge of the basic skills required by human resource specialists. An important corollary to this need for basic training in personnel management as it impinges on training, underlined in the Rodger et al research, is that we should not view T.O's as potential personnel managers or appear to be providing them with training as a preparation for the wider (and deeper?) roles of personnel managers.

Reporting Levels

The low reporting levels of T.O's has for long been a subject of some sensitivity among trainers (Brown (1963), Stevenson (1964)) who have railed against the dangers of subordinating the training function to low-status personnel managers. Hamblin (1966) has also illustrated the strain and hostility that could result from this subordination. But it was later argued (Management of Human Resources (1972)) that effective coordination between the personnel and training functions was an essential prerequisite for successful human resource activities. Later researches (Rodger et al and EITB) focused on the reporting and operating levels of T.O's and their acceptability to management but, while still concerned with the relationships between personnel managers and T.O's, were less pessimistic than earlier commentators: a large number of bosses were in the personnel function but neither research espoused the case for the isolation of training from personnel.

The Rodger et al and ASTD researches supported the situation found in the Frank research of high reporting levels among many T.O's. However, the EITB study noted the circumscribed

nature of T.O's and their lack of access to top level management. The present research tends to support the findings of the Rodger et al and ASTD researches and shows a trend over the three year period to a higher reporting level for a third of respondents. This upward mobility may have resulted from fortuitous events, such as reorganisation, or from a greater acceptance by managers of respondents and with it the increased possibility of working with, and for, higher levels of management.

But this apparent enhancement could result in a paradoxical situation in which the capacity to develop competence and acceptability in the training function at lower levels of training, levels at which mechanistic formats have been developed (e.g. operative, craft training), could lead to promotion into areas, such as management training, where as Rodger et al point out, fundamentally different organic (or 'people') skills are required. The consequent inability of a partially-trained T.O. to operate successfully at this higher level could possibly lead to a belief among managers that the training function has only a limited scope within an organisation. Training officers must therefore be sensitised to the demands for new skills which may result from greater acceptability and higher reporting levels and to the possible consequences of extending beyond low level, formalised training, where there may be a negative skill transfer.

Managerial Attitudes to Training

It has been argued (Lippitt (1969), Pettman (1971)) that one of the factors determining the capacity of an organisation to change is its managerial style and the attitudes of its managers to training. Much of the literature on management's attitude to training tends to take a very pessimistic view: Rodger et al found that unfavourable attitudes was the most frequently mentioned snag and suggested that this problem was the root of most other problems faced by T.O's in their organisations.

This problem of negative management attitudes to training, illustrated largely in their unwillingness to take training seriously and not simply as a statutory imposed activity, is also apparent in the EITB research but not as obtrusively as in the Rodger et al study. Later researches (Frank, ASTD) do not support this view of managerial hostility, or indifference, to training. The present research concentrated on the comparative perceptions of managers and T.O's attitudes and expectations to important aspects of training. The findings in this context reinforce the trend to positive attitudes to training found in the Frank and ASTD researches with the surprising exception that managers appear to be more convinced of the contribution of training to organisational effectiveness than their T.O's!

However, the present research also revealed that ~~it is one thing for~~ managers ~~to~~ apparently HAD positive attitudes to training and ~~to~~ accept the need for training activities but quite a different situation emerged when managerial attitudes were tested in the context of specific categories of training. This difference was illustrated in the wide variations in managerial support attained by respondents in certain training categories: the traditionally acceptable areas of craft and operative training had a 38% rating in the 'uncooperative' grouping, senior managers also appeared to lack enthusiasm for their own training requirements while showing some measure of support for the training of other employee categories. These findings have important implications for the trainers of T.O's since T.O's must be prepared to handle the sense of threat which managers may feel when they are attempting to extend their training remit: a threat which may be diminished by the current trend to use self development approaches of the kind elaborated by Pedler et al (1978).

Common Roles

The findings of this research in this area coincides with those of the major researches: there does not appear to be a set of

of roles or activities common to all T.O's. But it has proven feasible to list a series of common-denominator roles and activities which have a large measure of support in this and other researches. This was possible in the present study since the role listing used (62 roles) was largely developed from the Rodger et al and ASTD researches: the use of the EITB format was limited due to their use of 14 multi-role groupings. The common roles and activities adduced from the present survey and cross-checked against other researches emerged as follows:

1. Working with management
2. 'Selling' training to management
3. Identifying training needs
4. Preparing training programmes
5. Administration of training
6. Developing training contacts
7. Recruiting and selecting trainees
8. Liaising with educational organisations
9. Advising on the training implications of legislation
10. Conducting training sessions
11. Budgeting and costing training
12. Writing training reports
13. Using training techniques
14. Counselling
15. Establishing training objectives
16. Evaluating training

A series of important themes emerges from this grouping of common roles and activities. There is strong support in the present research for the findings of Rodger et al, supported by Chalofsky and Cerio (1975) and Nadler (1979), of the move from the T.O. as a direct trainer to one who acts as a training adviser. The work of Clement, Walker and Pinto (1979) also supports this changing emphasis on the management of training as against direct training or teaching activities. This accentuation on the T.O. as a manager of training resources is also supported in the earlier work of Boydell (1970) and in the

MSC (1978) framework ("Managing element").

The present research differs from the Rodger et al and EITB research findings in one important aspect of role activities: they found administration to be a common role but that it had negative connotations of time-consuming, 'paper pushing'. Respondents in the present research saw the administration of training as an important means of extending the categories of trainee covered, particularly in the context of management training. This positive view supports the contention of both the Cotgrove and Johnson (1973) and the Chalofsky and Cerio (1975) studies which view administration as an important part of the training function. This job area presents particular difficulties to the trainer of T.O's since administrative requirements tend to be highly specific to the T.O's organisation but Tavernier (1971) and Craig and Bittel (1977) supply helpful guidelines.

The fact that there are considerable difficulties encountered in attempting to isolate common role areas (16 out of the 62 listed are isolated in this study), underlines the logic behind the OSTD (Kenny (1976)) approach which uses a set of job items listed in a grid format from which the T.O. selects his job-related requirements in conjunction with his management. But the trainer of T.O's requires a broad set of elements of the type developed by the MSC (1978): 'common areas of know-how' on which the T.O..can build and develop his current, possibly limited, job-related requirements.

The present study also supports the need for a further examination to be made of the factors determining effective relationships in the operation of a training system and reinforces the high rating given to 'working relationships' in the ASTD research. This is an area which is mentioned en passant in the diagnosis and problem solving sub-section of the MSC (1978) proposals but which justifies further research following the work of Pettigrew and Reason (1978) on the importance of relational factors in the attainment of resources within a

'role-person-culture' context. This research and the three other main researches in this area (Rodger et al, EITB, ASTD) illustrate the gap between the practitioner's perception of what he does (and what he feels he should be doing) and what writers on training, such as Johnson (1976) and Nadler (1979) list as 'ought' requirements for the human resource developer. The former group show relatively low levels of activity among participants in areas such as job training analyses, budgetting and, although to lesser extent, evaluation. Job training analyses had a low listing on all the UK studies and on the top 25 ASTD job items.

A further area which attracted dissension is that of O.D. These role areas had little support in the present study and were not utilised in the role listings of either the Rodger et al or EITB studies. But the former research came out strongly against the use of the T.O. as an O.D.-type consultant arguing, with some justification, that such a set of roles "are not strictly T.O. roles". This viewpoint was largely supported in the research findings of Tranfield and Gill (1972) in their study of the extent to which T.O's were able, or had the potential to utilise, O.D.-related techniques. Nadler (1979) contests this view and urges the use of such broad roles as 'change agent' and 'consultant' but there is little support for this role area among practitioners. The present research, while accepting that the implementation of O.D. is beyond the competence of the average T.O., nevertheless argues the need for T.O's to know the basic concepts of O.D. so that they have the potential to assist in training activities derived from its application.

It is of interest to note that the broad and conventional role expectations which emanated from Training Boards, such as Local Government Training Board (1973) and the Chemical and Allied Products Industrial Training Board (1973), correspond closely with many of those stemming from detailed researches although they tend, unlike the MSC (1978) recommendations, to underestimate the relevance of environmental factors.

Content of Training Roles

The trend in most researches on the roles of T.O's, and in training literature generally, is to list quantitatively ranked roles and assume a measure of homogeneity in the activities comprising the individual roles. A comparative examination of some of the main terms used in role areas illustrates the weakness of this assumption. For example, in the area of job training analysis Stammers and Patrick (1975) use the term 'job task' and 'skill analysis' interchangeably, in contrast with the DE (1971) interpretation which defines analysis as a process resulting in a job description or, if done in depth, a job specification: Boydell (1981) concurs with this latter view. A similar confusion is apparent in the use of the term 'evaluation' if we compare the DE definition with those of Hamblin (1974) and Warr et al (1970).

The present research underlines this need to establish and teach a standardised approach to role content and considers it an essential prerequisite for the effective training of T.O's. These findings are derived from the in-depth study of four main role areas (job training analysis, determinants of training needs, determinants of training budgets and evaluation). It is also suggested that the apparent failure of respondents to utilise key role areas may relate to respondents' idealised definition of the activities constituting a role: if they are not completely fulfilled the role is considered to be unused. This would go some way to explaining the erratic listings of key role areas and job items in all the main researches and may help clarify the distinction between what is done in practice as compared with the 'ought' of much training literature.

Role areas in relation to size of firm

It has been argued that there are likely to be differences in the attitudes of managers to training undertaken in small and large firms (Pettman (1971)) with managers being less involved

in small firms, that training roles also vary according to the size of firm (ITC (1964)) and responses to questions on training are likely to be lower in smaller firms.

There was no significant difference in the present research between the role titles used by respondents in smaller firms as compared with those in the larger firm categories over the last year. A check of role differences made between the 'all firms' top 20 roles and those of each individual firm groupings, using the Spearman Correlation, showed a correlation between 0.8277 (in the 600-999 grouping) and 0.6936 (in the 1500-1999 grouping). The smallest firm size category (100-299) had a coefficient of 0.7550 while the largest (2000+) had a coefficient of 0.7996.

However, a relatively high level of agreement emerged on the top 10 roles within each firm grouping although this may have resulted from the small number of respondents in each group. This situation, therefore, suggests the need for an extension of research activities in this area particularly as there appears to be a trend for certain roles to be more popular at one end of the firm size categories. Examples of this trend in the smaller firm categories include the roles of 'working with management', 'administration of training' and the roles of developing internal and external contacts. Conversely, the role of 'selling training to management' is rated higher in the larger firm groupings. The role of 'liaising with Training Boards' tended to vary in popularity between the smaller and larger size firms with the trend being for it to be more popular in the smaller firms and less so in the larger firms: possibly suggesting the need to reconsider the current policy of disengaging the smaller, administratively inconvenient, firms from the national training system.

There was also a polarisation of the personnel-orientated roles of 'recruitment and selection' and 'assessing future manpower requirements' round the smaller size firms. This may be due to the greater likelihood of a specialist recruitment

and selection function in larger organisations. There was no evidence to suggest differences in the attitudes of managers to training between different firm sizes.

Several important qualifications must be applied in the interpretation of these findings on the relationship between training functions and firm size. First, the number of firms in each firm grouping was small and made the formation of anything but the most tentative of conclusions unrealistic. Second, even given the possibility of differing role patterns in small and large firms, there was the added complication of variations in the content of apparently similar role areas, for example, the procedures involved in carrying out an assessment of training needs in a firm of 2000+ employees compared with that of an apparently similar role in a firm of 100 employees.

This attempt to relate role patterns to the size of firm raised more questions than it answered but sensitises us to the need to consider the comparative scale and content of the roles likely to be undertaken by T.O's in different sizes of firms and the possible need, in the case of T.O's in smaller firms, to extend their own training beyond traditional training roles into role areas related to the broader field of personnel management and human resource development without changing their learning-orientated function.

There was no evidence to suggest the need for a wider span of role requirements for T.O's in smaller firms as against those of T.O's in larger firms, or to support the view that T.O's and their managers are less cooperative in small firms.

Role Changes over Three Years

There is no evidence of a consistent pattern of development or change in the roles of T.O's in the last 20 years or even in the last three years. The late 1970's and the early 1980's witnessed a continuation in the demand for the relatively sophisticated 'change' roles, supported by writers such as

Lippitt (1969) and Boydell (1970) but there is little evidence to suggest that they were being applied either in the training or personnel functions (Thakur et al (1978)). However, the job of the T.O. appeared to be expanding and changing with a greater emphasis on 'the management of learning' and less on direct training: a continuing theme in the MSC (1978) and Clement et al (1979) studies. A further fundamental change in emphasis was that related to the importance of relationships between the T.O. and his managers: an aspect strongly supported in the Pettigrew & Reason (1978) research and which comprises a central feature of the MSC (1978) 'Common areas of know-how'.

But no attempt had been made, prior to the present research, to measure the extent to which the roles undertaken by T.O's had evolved over a period of time within practitioners' organisations. No consistent pattern of role changes emerged from the comparison made between the roles currently undertaken by respondents and those they performed three years previously but a series of trends were discernible.

One of the major themes in the MSC (1978) recommendations is the need for training to be 'put in a business and manpower setting'. This approach is an essential feature of writers such as Boydell (1970) and Nadler (1979) who have viewed direct training as a necessary but relatively peripheral part of the T.O's function. This view is also apparent in the researches of Clement et al (1979) who see the job of the T.O. as moving from face-to-face training towards the Davies (1971) concept of a 'manager of learning'.

The present research supports this accentuation on the wider use of the training function and illustrates the point by showing a considerable extension in the role area of 'assessing future manpower requirements': the largest single area of role change over the three year period. This viewpoint is further reinforced by the increasing use of the role 'assisting in the development of organisational change'. But it should be noted that the accentuation is on the 'assisting' function and not on

the introduction or direct implementation of O.D. techniques. This research does not support the O.D. 'specialism' utilised by half of the Frank (1975) respondents but rather the view that 'it is unlikely that the rest of the management team will accept recommendations for fundamental changes from a training specialist' (Perry (1972)).

The less contentious role area of 'identifying training needs' also increased over the three year period. This is one area in which all writers on training agree is a key role; disagreement only appears in the responses from practitioners but this is more likely to stem from the semantic interpretation of what comprises this and other key role areas.

Given the trend in most researches towards an increase in indirect training roles it is salutory to find that direct training techniques are still an essential feature of the T.O's job. The present research shows an increase in the role of 'lecturing' over the three year period: illustrating the relevance of the MSC (1978) element on direct training and the 'learning specialist' role which forms one of the four role areas in the Chalofsky and Cerio (1975) research.

There was also an increase in the use of two role areas in which there is research evidence of insufficient activity (Rodger et al and EITB): costing and budgetting. The present research shows what is hopefully a trend towards greater participation in costing activities and an increased application of the budgetting function in line with the findings of the Frank (1975) research.

The roles of counselling and coaching have few proponents in training literature (e.g. Megginson et al (1979)) but these roles, and particularly that of counselling, are being cited increasingly in training research (Pinto & Walker (1978), White (1979)) as essential for the relational aspects of the T.O's job: Clement et al (1979), Zemke (1979) and Pettigrew & Reason (1979) argue that human relations skills are among the most important of the skills required by T.O's.

The increasing use of the counselling role in the present research over the three year period helps illustrate the point that it is no longer sufficient to think of training solely in terms of technical inputs supplied in formal learning situations. A capacity to apply non-judgemental helping techniques is called for in areas such as management training and development where the twin themes are superior/subordinate coaching (Megginson et al (1979)) and counselling and self development (Pedler et al (1978)).

The 'managing' aspect of the T.O's job tends to have more support in the writings of professional trainers (Boydell (1970)) and in the recommendations of government-sponsored training studies (Chalofsky & Cerio (1975), MSC (1978)) but has not been a central concern in the major training researches. However, it is becoming apparent in the trend towards the extended use of indirect training activities that the management of resources is an important aspect of the T.O's job. One element of this managing role is the control of human resources and an important facet of this controlling activity is that of disciplining staff: a role which increased in use over the three year period in the present research. This finding reflects the situation which many respondents encountered in the Rodger et al research and isolated as a principal component of the T.O's job ('dealing with problems of discipline'). A further factor which may tend to increase the T.O's difficulty in this area is the possibility of greater T.U. involvement in the training process: the present research shows an extension in the use over the three year period of the role 'working with T.U's'.

An important qualification in the use of role changes over the three year period as a means of determining future training requirements for T.O's is that they are a quantitative measure of change and must therefore be considered with other factors. This is illustrated by the fact that the essential roles of job training analysis and evaluation do not appear in either the one year or the three year top 20 roles and the essential

role of 'writing training objectives' appears in the three year listing but not in the one year listing. But the cross-checking of role changes over three years with other researches suggests the need for T.O. training in the following areas:

(a) assessing future manpower requirements;

(b) assisting in the development of organisational change;

(c) lecturing and instructional techniques;

(d) costing of training and the preparation of budgets;

(e) counselling;

(f) disciplinary interviewing;

(g) working with T.U's.

The number of role areas covered by each respondent did not increase markedly over the three year period and for role areas which decreased in popularity (writing training objectives, making grant claims, getting training equipment, structuring training records) over the three years there was a counter-balancing increase in other roles (assisting in the development of organisational change, counselling, lecturing, liaison with Training Board staff).

The level and category of trainees covered by T.O's ~~is among the~~ ARE major determinants of roles and role activities. The most common trainee category in earlier researches (Rodger et al and EITB) was that of supervisors: this trend coincides with the findings of the present research in which supervisory training shows an even greater increase over the three year period. In contrast with other research findings the present research shows the largest single increase in trainee category over the three year period within the management categories (director,

senior manager and manager). This category was lower in the Rodger et al and EITB researches possibly because their findings relate to a training situation in the mid-sixties and early seventies when there was a heavier accentuation on technical training (operator, craft, technician), although only half of the respondents in the Frank (1975) research trained the management category. The present research suggests the possibility of a trend towards management training in the late seventies which may stem from an increasing acceptance of the training function: calling for radically different training skills.

There are consistently high levels of clerical training in all researches, including the present research: a finding which justifies a demand for the training of T.O's in this area. But this trainee category appears to be underrated or ignored in T.O. training programmes due possibly to the job-specific nature of much clerical training.

The wide range of trainee categories covered by respondents in all researches points the need for a measure of 'generalist' training for T.O's and further justifies the MSC (1978) 'Common areas' approach.

Difficult roles, time-consuming roles and key areas

The findings of the Rodger et al research differed in certain respects from those of the present research in the context of difficult roles or job items although both sets of respondents suffered from low returns in this area. The former found a greater level of general agreement on what constituted the difficult parts of the T.O's job and also isolated different types of problem areas, mainly in the sphere of obtaining resources (getting more staff, space, finance). The Rodger et al difficult roles that coincided with those of the present study were threefold: (a) increasing training budgets, (b) evaluation and, (c) selling training to management. This latter area also emerged as a major difficulty for respondents

in the Frank (1975) study and so presents a special challenge to the trainers of T.O's. Training officers should therefore be trained in two essential and related areas: (a) technical competence in the presentation of a case to management and, (b) a knowledge of the selling points unique to the training function.

In the context of time-consuming roles, there ~~is~~ WAS a preponderance of clerical and administrative job items in the Rodger et al study and a concern that too much time ~~is~~ WAS wasted on paperwork. This negative approach to both administration and clerical work also appears in the EITB and Frank (1975) studies. In contrast, the present study comprises mainly training-related activities in the time-consuming roles: the administration of training is high on the list of time-consuming roles but is viewed as a productive medium for the extension of training. But there are three time-consuming areas common to the three researches: (a) the identification of training needs, (b) design and implementation of training and, (c) the administration of training. The first two areas are largely featured in training literature as central to the T.O's job but there has been a tendency in training research, with a few exceptions (e.g. Chalofsky and Cerio (1975), Nadler (1979)) to view clerical and administrative activities as an unproductive necessity: this situation is reflected in training courses for T.O's (Donnelly (1979)) where the administrative function is apparently largely ignored.

The attempt in the present research to determine a qualitative rating ('key areas') of roles resulted in a response similar to that obtained in the Rodger et al research in that the top items largely coincided ('selling training to management', 'working with management' and 'identifying training needs'). The area of identifying training needs was also a key task in the Frank (1975) research along with designing and preparing programmes and organising training. The evaluation function was rated highly in the Rodger et al study but not in the present research or the Frank study.

A comparison of the ranked, difficult and time-consuming roles and key areas in the present research shows a close relationship between what the T.O. is doing with what he perceives as his priorities. This contrasts with the Rodger et al research in which "most of the T.O's were unable to spend adequate time on parts of the job they felt they should be doing".

The importance to respondents in the Rodger et al research and in the present study of both 'working with management' and 'selling training to management' and the continuing theme in training literature of the relational role - a central feature of the Pettigrew and Reason (1979) research - serves to underline the interpersonal skill requirements of T.O's in the context of the organisation. The training of T.O's should therefore be designed to include two major requirements: (a) training in the use of interpersonal skills and, (b) a knowledge of decision-taking procedures, particularly those relating to the assessment and allocation of training resources. The 'role-person-culture' hypothesis outlined in the Pettigrew and Reason research could serve as a conceptual framework for this important area of training.

Areas of Impact

An absence of both impact and credibility is a common theme in the limited number of researches carried out to-date on the job of the T.O. in this area. The Rodger et al research cited a series of factors which minimised the impact of their respondents, chief among them being a lack of training resources, the negative attitudes of managers to training and the difficulties experienced in carrying out key roles. They also cited the factor of poor career prospects.

The EITB findings concluded that the lack of impact stems from grant-maximising motivation of management, low levels of recruitment to the job and the lack of technical mobility: T.O's tended to remain in operator or craft training and were often

unable to move into the more prestigious roles of management training and development. The present research underlined the importance of these latter roles as areas of expected, and actual, impact for a large minority of respondents and illustrated an apparent ability on the part of respondents to move towards the administration and application of management training and development often using administration or junior management training as stepping stones over the three year period. Respondents did not share the pessimism of respondents in the Rodger et al and EITB studies about a lack of either resources or opportunity to perform expected roles in management training.

This extension into the impact areas of management training may have resulted from the increasing application of highly participative self development activities generated by the work of writers such as Hague (1973) and Pedler et al (1978).

The trend towards greater activity in management training, if it has general application, has important training implications for T.O. training in that it may be an area of high risk for practitioners in comparison with other trainee categories, e.g. operators and sales: failure to gain acceptance in this category can not only lead to a diminution in other role activities but may also result in damage to relationships with personnel who have the power to allocate (and withdraw) training resources.

The preparation necessary for management training has certain important characteristics. Unlike craft and operative training, there can be FEW ~~no~~ highly formalised procedures or programmes since training programmes SHOULD STEM ~~may largely result~~ from self-syllabus building. This type of training is also characterised by the need for often complex interactive and decision-taking behavioural skills. The capacity to develop these training skills may well be within the capacity of most of the current research sample who derive from supervisor and management jobs but it is by no

means certain that it is within the potential scope of all T.O's, particularly if they have been recruited from a craft or operative background.

Career Aspirations

A majority of T.O's in both the Rodger et al and the Frank researches preferred to stay in training while only one-third of those in the EITB and in the present study had this aspiration. The other main aspiration in this study, and one in which the other studies were largely in agreement, was in the area of personnel management: this was viewed as a natural extension of THE training FUNCTION and was particularly popular among young respondents.

The later studies all differed from that of the Rodger et al research, undertaken in 1966 although published in 1971, in that fewer respondents, particularly in the younger age group, considered training to be a middle or long term career aspiration. The trend in the over 50's age grouping, who appear to be increasingly recruited from the management function, is to view training as an end of career activity.

Relations with Training Boards

This research reinforces the view of Forrester (1968) and that of the EITB research in that there appeared to be a substantial degree of grant maximisation in training activities within organisations rather than the assessment of specific requirements by T.O's and their managers: Training Boards may HAVE be unwittingly supplying over-simplified, externally determined criteria against which the T.O. function is being monitored and evaluated.

The present research supports the view of both the Rodger et al research and the MSC (1980) that there is an acceptance, or at least an acquiescence, among most T.O's and their managers of Training Boards. Respondents distinguished between Training

a view which does little to reinforce the action to decimate Training Boards.

Boards and their Training Advisors and a large majority of respondents describe their relations with Training Board personnel as 'cooperative', with a smaller level of support from their managers. There was a trend over the three year period towards extending links with Training Board staff and to use their expertise in a consultative context. However, the present research still shows a substantial minority of managers who are either apathetic or hostile to Training Boards even in a period when levy payments were decreasing. This must raise the question for T.O's, professional organisations and government agencies of the extent to which it is either feasible or desirable to attempt the development of industrial training through the medium of 'enabling' enactments.

Direct Training

A common requirement for T.O's which emerges from most researches is that of a need for knowledge and skill in the application of direct training techniques. This view is supported by the high ranking given to 'appropriate training techniques' in the ASTD study; the technical instruction content of T.O. jobs in the Frank research and the inclusion of the 'learning specialist' role in the four roles defined by Chalofsky and Cerio. The MSC (1978) also supported this area by including a 'direct training element' in their 'Areas of specific knowledge and skill'.

The present research illustrates a surprising allegiance to the formal lecture as a training technique: a technique which was low on the ASTD top 25 rankings. Conversely, participative learning methods, such as seminars, case studies and role play, while high on the ASTD listing, were only applied by about half of the respondents in the present study. However, there was a considerable increase in the use of interactive techniques over the three year period which is in line with the expectations of Rossett and Sharpe (1981) who identified the trainer as a systematic problem solver.

The Middlesex T.T.O. (Introductory) Course

One of the major points made against the CTC (1966, 1967) proposals for the training of T.O's was that their minimal introductory requirements had become the main training input for T.O's. As Perry (1976) pointed out, 'The Hors d'Oeuvre became the main meal'. This viewpoint is borne out by the present research in that there has been a minimal amount of post-course training undertaken by respondents, particularly in the key areas of assessing training needs, job training analysis and evaluation.

A large majority of respondents indicated that, while most of their objectives had been fulfilled, their training requirements in the area of 'validation and evaluation' were unfulfilled. But no attempt appears to have been made to compensate for this inadequacy by post-course attendance.

The apparent fulfilment of respondents' requirements by attendance on an introductory course is a cause for concern since the course was originally designed to meet the initial requirements of entrants into training, specifically in the key areas of assessment, analyses, programme design and evaluation. This partial success in the fulfilment of expectations may reflect the low levels of aspiration of both managers and their T.O's, with the added possibility that T.O's are accepting these limitations. The limited training undertaken by respondents in the post-course period underlines the need for extreme care in the design and implementation of initial training courses as it would appear from this and other researches (Frank (1975)) that it is likely to be their main training input. Frank illustrates this point in his finding that 20% of respondents had 2 weeks training in 5 years and only 25% had 5 weeks or more.

It may well be the case that much of the learning requirements of T.O's are met, not on courses, but within their organisational environment. This possibility underlines the need to establish a balance between the immediate needs of, (a) the T.O. and his

organisation and, (b) the future developmental and occupational needs of the T.O. It would appear from the present study that the application of the OSTD grid format (Kenny (1979)), used to check current job performance expectations, would go a long way to meeting the former; while the MSC (1978) proposal on 'common cores' would go some way to meeting the latter.

The problem of wide variations in the content and methodology of initial courses (Tyson (1970), Donnelly (1979)) could be minimised by applying the MSC (1978) proposals for involving the trainers of T.O's in the planning, implementation and monitoring of TTO activities through the medium of peer assessment.

While this research indicates a need to focus training requirements, particularly for new T.O's, on a set of 'generalist' requirements it urges the necessity to reappraise the terminology and content of roles to ensure uniformity and realism in the definition of roles and the tasks which the roles comprise.

Further Research Requirements

~~This~~ The study highlights the need for further research in four main areas.

(i) An attempt should be made to identify the factors determining the selection and application of training roles;

(ii) there is a need to consider the perceptions of managers, service personnel and trainees in order to widen our viewpoint on training roles;

(iii) the relevance of relational factors in the attainment and use of training resources and the areas of decision taking and power bases of T.O's require detailed study;

(iv) we should attempt to isolate the factors likely to predict success in the subsequent training activities of new T.O's.

* The Thames Regional Management Centre ~~is~~ HAS currently undertaking a research project in this area. (See LEDUCHOWICZ and BENNET (1983).

APPENDIX (i)

THE EMERGENCE OF TRAINING AS A SPECIALIST FUNCTION - AN HISTORICAL PERSPECTIVE

1. THE TRAINING OFFICER BEFORE THE 1964 INDUSTRIAL TRAINING ACT

The limited literature of the post-1960 period largely illustrates the Training Officer as a practitioner in two major training areas: craft training and operative training. There is a long historical justification for the trainer as an ex-craftsman responsible for the development of his craft against a background of requirements stemming from the Elizabethan period with its characteristic approach of restricted entry, age limits and pre-set length: factors which appear to relate more to the supply and demand for craft trainees rather than the technical content.

Wellens (1963) characterised this traditional pattern, largely unchanged until the 1950s, as follows: fixed duration (normally five years no matter the complexity or simplicity of the trade to be learnt); no form of certificate or hazard of failure; rigid age limits for entry; no necessary requirements; no national control or supervisory authority; training essentially uni-craft.

Pressures were being placed upon both employers and trade unions to change through the application of an objective analysis of training arrangements; the works of Liepmann (1960) and Williams (1963) assisted in this long-needed exercise in the structuring of training requirements for what was traditionally viewed as a source of cheap labour. It was generally agreed that the best that the system could turn out was as good as anywhere in the world but that the vast majority of apprenticeship training exhibited the worst limitation of the exposure method of training.

The job of the Training Officer in this area, although Training Officers were few and mainly to be found in large engineering companies, was generally limited to the operation of formalised off-the-job schemes in which the Training Officer was employment interviewer, selector, instructor, liaison and placement officer with departments in the company and external educational institutions and, to a very large

extent, training administrator. Training Officers in these circumstances tended to be dedicated ex-craftsmen who often had more interest in the transmission of traditional skills than knowledge of, or interest in, learning skills or the projection of the future trends in skill requirements within their organisation or their industry.

The setting up of the Carr Committee (1958) to consider the arrangements for the training of young workers in industry and the adequacy of the intake into apprenticeship, in the light of the expected "bulge" of teenagers, marked a tentative step in the move towards increasing the effectiveness of craft training, albeit within the traditional laissez-faire approach. The recommendations stemming from this report underlined the importance of effective instruction, the need for managerial support and the necessity for examining the lengths of apprenticeships or at least increasing their range. They also underlined the importance of complementary education and the need to link it with the requirements of the apprentice's firm. But they fell short of suggesting the application of any legal compulsion in this area and only went as far as recommending the need for a centralised review body to spread the limited know-how on apprenticeship to other firms. In the context of apprentice training, the main result of the Carr Report was that it focused interest on the parlous state of much of the training in this area.

The only recommendation to be fulfilled that was to have any effect on apprenticeship training and the work of the training officer was the setting up of the Industrial Training Council: this advisory body was jointly established in 1958 by the Trade Union Congress and the British Employers Confederation to review the recruitment and training of young people and as a flagship for the dissemination of systematic training, particularly that of craft training. Much of the information on the work of Training Officers generated at that period resulted from studies and activities carried out by the ITC's grant-aided field staff, but they could only exhort industry to take action at a time when entry into apprenticeship training was actually diminishing. The ITC was prominent in the continuing struggle to increase both the quality and quantity of apprenticeship by making grants and expertise available for the establishment and running of group training schemes although they

were far from optimistic about the extent to which industry was either taking up its responsibility or that the scope for the introduction of systematic training was being fulfilled.

Prior to the Industrial Training Act (1964) apprenticeship training was becoming a live issue with educationalists who argued that a National Apprenticeship Scheme, presaged in the Carr Report recommendation, should be established. Williams (1963) had previously argued the case for a compulsory Apprenticeship Authority (comprising representatives from employers, trade unionists and government departments) to which apprentices would be indentured and for whom it would organise consultants and advisors on training methods, financed by government funds. There was a spate of conferences, exhortations and debate during this period but little activity likely to change the contents or methods of training apprentices or change the job of the apprentice training officer. One exception was the pioneering work being done by the ITC's Training Services Agency and the effective but highly formalised training schemes of large employers and group training schemes. Perry (1976) provides an excellent analysis of the pressures working to change apprenticeship training in this period of policy formulation prior to the 1964 Industrial Training Act. Operative training activities as a function within the training officer's job were initially determined by the pioneering work of Seymour (1964) in the 1950s. Seymour's work in this field was an extension of activities in Work Study and much of the early work has a job method rather than a training bias. The strength of his pragmatic approach lay in his proven experience as a cost-cutting trainer in a job area in which, unlike craft training, there tended to be a high labour turnover; it was also an area of training where, due to the short-cycle repetitive nature of the work and its freedom from historical strictures, immediate and reasonably provable cost-benefit could be attained. Seymour's first publication (1954) may not have had the research basis of his later work (1966) but it certainly contained a very practical vade-mecum for the practitioner more interested in results than in pure research methodology.

The function of the training officer in this field of training comprised six major activities: (1) the preparation of detailed job breakdowns showing skill, knowledge and attitude requirements; (2) the structuring

of training programmes in which basic skill and knowledge requirements were differentiated and transmitted to trainees with relevant fault analysis; (3) the simultaneous build-up of pre-determined quality and time targets; (4) the development of stepped practice to ensure minimal fatigue; (5) the successful transfer of operatives to the work environment; (6) a further important requirement was the administration of the training programme, particularly the structuring and maintenance of the performance records of trainees. It is arguable that training took its first faltering steps as an economic and professional activity within organisations through the work done by consultants such as Seymour (1954), Taylor (1966), King (1964), as well as the exhortation and practical work done by the training development officers of the ITC before 1960. While it can be argued that there were two main types of Training Officer in the pre-1964 period there is, however, little objective evidence to substantiate the actual work carried out by these two types of training officer in practice. The NIIP (1956) underlines this point in discussing the training officer in terms of 'main impressions'; these are as follows: (i) a tremendous variety of job areas ranging from purely operator training to a combination of apprentices, supervisory and management training; (ii) a confusing range of job titles including Staff Training Officer, Apprentice Supervision and Group, Establishment and Plant Training Officers; (iii) great variety of reporting levels ranging from first line management to board level and, (iv) the recruiting sources of Training Officers appeared to vary considerably with no standard route into the job and a wide range of educational background among trainers.

Prior to the 1960s there was an almost complete absence of any objective analysis into the job demands of the Training Officer. Given this situation it is hardly surprising that industrial training remained unrecognised as an activity capable of systematic study or having enough common ground to make a general training requirement either possible or practicable.

The NIIP carried out a research study in 1956 on in-plant training in 200 manufacturing organisations on jobs having a training period of less than three years and found little evidence of systematic attempts at training. They reached the conclusion that a lack of training records, the difficulty of isolating the effects of training from other factors and the variety in the jobs studied made it impossible to reach anything but a highly tentative conclusion on the effects of training in the limited number of organisations within their study.

The first relevant study into the job of the Training Officer was carried out by the London and Home Counties Group of BACIE (1962). The need for the study emerged from BACIE's continuing desire to mount systematic training courses specifically related to the actual job of the Training Officer and based on a study of the jobs of Training Officers in their member firms. The study was based on a questionnaire sent out to 147 companies (with a return of 88) and tended to the conclusion that, while both individuals and firms are unique in their requirements there were, nevertheless, common patterns of behaviour requirements in the training function which would lend themselves to the structuring of an introductory course relevant to individuals entering the training field. The group underlined the tentative nature of their findings and made no attempt to extrapolate their statistical findings since the pilot study covered a small but interested variety of companies engaged in a broad series of training activities. Attempts to define the functions of Training Officer during this period were seldom published in terms of general role or even job expectations, but rather tended to emanate from course activities designed to educate potential Training Officers or develop existing Training Officers: the motivating force for a commonly acceptable job definition was largely educational and the major instrument for the interpretation of expectations was the formal course. This factor is illustrated in the course-running activities of the 1950s and early 1960s.

The earliest trainer-related course run in the UK were the (then) Ministry of Labour Training Within Industry (TWI) instruction courses which were imported from the US in the 1940s and were originally intended for the accelerated training of factory supervisors. These courses were initially run for Government Training Central Instructors but were opened to industrial instructors in 1954. In 1950 BACIE was instrumental in organising the first trainers' course through their West Midlands Group. The part-time course, run in conjunction with the (then) Birmingham Technical College, comprised six half-day periods and was called "The Principles and Practice of Industrial Training". A series of 5-day courses for Training Officers responsible for the application of training techniques was later mounted jointly with BACIE and the British Institute of Management, at what is now the Roffey Park Institute,on human aspects of management. Lecturing staff comprised

external tutors, largely from committed practitioners, and Roffey Park staff. These courses were initially administered by BACIE and sponsored by the BIM, but this sponsorship was enlarged to include the Institute of Personnel Management, Industrial Welfare Society and the National Institute of Industrial Psychology.

Although there was a continuing demand for these courses, BACIE felt there was also a need for in-depth courses and introduced 3-week courses for new Training Officers in 1956, but these did not receive sufficient support to make them viable. Undeterred by this reaction, and sensitive to the need for greater flexibility in course structure, they launched a two-tier course in 1958 comprising a two-week general course to be followed by a one-week seminar covering specialist aspects of what was considered to be the Training Officer's job. The former included the UK education structure, aspects of recruitment, the learning process, techniques of instruction, the practical application of learning aids, and training for specific categories of trainee (operator, apprentice and supervisor). This course was participation-orientated with case studies and projects fulfilling a central role in the learning process. The seminars were originally designed to cover a broad area of training such as that of management, office staff and commercial apprenticeship along with such topics as work study, human relations and selection and assessment.

These courses were latterly developed into a 4-part modular format comprising: (a) instructional techniques, discussion techniques and training aid, (b) use of case studies, (c) relevant study assignments, (d) an introduction to the design of business games. BACIE were also keen to apply the results of their 1959 Working Party Report (see above) and so set up a National Working Party to decide the syllabus, structure and entry requirements for a Training Officers' course. The results in 1963 was a 10-week pilot course based on what was then regarded as the necessary skills and knowledge requirements relating to the training function.

The syllabus of the BACIE experimental course (1962) was structured around what was considered to be the six main areas of training responsibility:

(a) organisational relationships;
(b) relationships with external educational and professional bodies;
(c) the selection process;

(d) the assessment of training needs and the structuring of training programmes for specific categories of employees;

(e) the application of appropriate learning techniques;

(f) the administration, control, budgeting and evaluation of training.

This venture failed after the first poorly-supported course for two main reasons:

(a) it was apparently offering a service beyond the current demand and expectations of those overseeing the training function and (b), as Perry (1976) pointed out, there was a general tendency to wait for the outcome of potential legislation following the publication of the 1962 White Paper outlining the government's radical change from the traditional laissez-faire approach to training to direction bordering on compulsion.

2. GROWTH AND CHANGE

The quest for a realistic definition of the Training Officer's function and the subsequent pressure for effective training in the post-1964 period stemmed not only from the financial compulsion built into the 1964 Act, but also from a complexity of motives: the need for government-inspired training boards to ensure the correct use of statutory funds in the context of a national manpower strategy aimed at the fulfilment of tentatively defined social policy; the desire of industry and commerce to maximise their training grants and returns on increasingly expensive human resources; the legitimate interest of educationalists and researchers in an evolving area of business activity; the growing demands of the professional organisations for enhanced standards and codes of practice; the national tendency for a learning-oriented profession to apply its diagnostic techniques to its own activities; the growing interest of psychologists and sociologists in the theory of organisations and their operating and change strategies; the general desire to help ensure that multi-million pound activities were based on premises which were logical, relevant and credible. The passing of the Industrial Training Act in 1964 - with its threefold aim of increasing the quantity of training, developing quality and relevance, and introducing equitable cost-sharing in training activities - initiated a new era of training activity. Much of the groundwork was done

by the Central Training Council: a purely advisory body established under the 1964 Act to help the relevant minister in his function as overseer of the training structures set up following the Act. The CTC had a series of committees to handle specialist areas including a research committee and one with the responsibility for the Training of Training Staff.

In 1966 the CTC Training of Trainers Committee published recommendations for an Introductory Training of Training Officers course. The main recommendations were (a) the course should be a residential sandwich course of at least six weeks' duration with an in-company project in the sandwich section, (b) colleges offering the course should 'exercise firm control on the selection of candidates', (c) there should be an approval procedure operated by the (then) ministries of Education and Labour. They also underlined the importance of course assessment, post introductory course specialist courses and the need for advisory committees to plan courses in consultation with local industry.

The proposed format which, with considerable individual variations, was to last for a period of twelve years, comprised five main areas: (a) the training function, (b) assessment of training needs, (c) formulating and implementing training programmes, (d) assessing training effectiveness, (e) a general area consisting of project reporting, visits to relevant organisations and private study. Major themes included: organisational studies and the function of management, budgeting and planning, job analysis and learning techniques, the validation and evaluation of training. The central theme was that training was a service function whose aim was to provide a service of knowledge, advice, skill and administration which would help the company to fulfil its manpower requirements. While these proposals were the work of a committee it is possible to discern the source of some of their thinking. The BACIE pilot scheme referred to above was clearly an important factor in the new design. But the committee proposals also reflect the thinking of Martin (1968) who developed a systems approach to training which was to become the model for much of the structure and classification of training activity and information retrieval systems. He analysed training activities in the form of a cybernetic loop comprising a fourfold

sequence of activities: (a) identification of training needs, (b) formulation of training policy, (c) implementation of training, and (d) assessment of training effectiveness. These activities, while sequential in time and subject to both internal and external constraints, were operated through an information feedback procedure which ensured that activities and information generated in one section were available to change or modify, where necessary, actions in other sections. The CTC format also reflects the thinking of Taylor (1966), particularly in the importance placed on the use of job performance criteria and the dualism of the managerial role with that of the Training Officer. Her practical experiences in consultancy and the survey work she had carried out in the construction industry led her to question the distinction between line and service functions. She showed that the training role varies, not only between organisations, but also at different levels in the same organisation, and the importance of personal credibility based on job performance and organisational objectives. Taylor envisaged the Training Officer's role as being threefold: (a) as a clarifier, assisting management in their training activities; (b) adviser, assisting in the formulation of training policies, and (c) as a provider of help in the analysis of what is to be taught in relation to expected standards of job performance and cost benefit. She accentuated the importance of organisational factors, reflected in the major study of McGhehee and Thayer (1961) in the US: they viewed training as a management tool used in three contexts: (a) organisation analysis, (b) operation (or work) analysis, and (c) man analysis, but pointed out that their conclusions had a meagre foundation in research work.

The Industrial Training Council published a series of booklets before 1964 using the considerable experience gained by their field staff in their practised and often innovative work in industry. These booklets covered such diverse topics as the systematic training of boys and girls in industry, craft apprenticeship, cooperation between industry and education, and group training schemes. In early 1964 the ITC published a booklet on the function of the training specialist in industry which recognised the important variables of organisation size and resource availability and underlined the fundamental requirements of systematic training. These included eight basic factors:

1. The planning of training to meet company needs and priorities.
2. The analysis of skill and knowledge to determine instructional needs and course requirements, particularly those relating to attainment standards, and the necessary resources to meet training requirements.
3. Recruitment and selection for the matching of people to jobs.
4. Designing and writing of training programmes based on job analyses and supplying learning and teaching information on training sequence, content and method.
5. Relevant course design. This comprised four main areas: (a) induction, (b) basic training, (c) planned experience, and (d) integrated further education.
6. Selection and training of instructors: a major factor determining to a large extent the success of subsequent training.
7. Responsibility for training must be vested in a senior manager who organises a controlling function and ensures cooperation.
8. The review of training schemes, including course content and trainee progress.

The major requirement of the Training Officer, they argued, is: "to advise management on the formulation of training policy at all levels and to assist them to carry it out".

The CTC's interim proposals of 1966 were followed by a "more detailed study" in 1967 designed to cover the longer term training requirements of the Training Officer. The Report did not suggest any fundamental changes to the structure or content of the introductory course as laid out in the 1966 Report, but went into greater detail regarding selection criteria to the extent of applying Rodger's 7-point plan to the selection of Training Officers. It was critical of the 'open-entry' policy of most colleges and made the point that "introductory courses will only be effective if the colleges are enabled to be more selective in their choice of students', but recognised that this could only be done "if industry is prepared to send trainees of good quality in sufficient numbers to make proper selection possible". The report also made detailed suggestions

for the development of postgraduate level courses to ensure future graduate entries for the training function. It suggested two possible strands of development: (a) in-depth, one-year post experience sandwich courses leading to a higher degree with the use of 'host' organisations to ensure relevance and practicality, and (b) shorter postgraduate, post experience courses for the conversion of non-training management staff as a preparation for taking up management responsibilities in training.

The difficult question of standards was also raised, as it was considered that they were necessary "to help the Training Officer and his employer to make an objective measurement of his attainments in preparing for his job and to encourage the development of common standards between the different institutions providing the courses". A major result of this report was the establishment of the temporary introductory course on a permanent basis within a threefold structure: (a) the introductory course, (b) guided practical experience, and (c) specialised courses.

The main piece of research carried out in the middle 1960s (although not published until 1971) was that carried out by Rodger et al (1971) to study the work of industrial Training Officers in both private firms and nationalised organisations in order to determine their responsibilities and the job areas which they found difficult or distasteful. This unique in-depth study, based on a scientifically sampled population, covered 254 full-time Training Officers from 142 organisations in 14 industries whose previous background tended to be: supervision, instruction in the services, or personnel work. Common denominator areas were as follows: administration of training of specific groups (few administered all groups); instruction, with the most common area being supervisory category; establishment of contact; training process activities. It is of interest to note that the administrative activities were the most time-consuming and also that certain key result areas, such as the identification of training needs and the evaluation of training, "were conspicuous by their absence".

Certain other factors of interest to both Training Officers and Training Officer trainers emerged from this study. A quarter of the Training Officers did not do any training. There was a proliferation of titles which related to the widely differing jobs in the sample in

terms of the number of different activities carried out, but also in the combination of activities where individual jobs tended to have unique patterns of activity and levels of responsibility. But one quarter of the jobs items listed in the questionnaire were part of the jobs of threequarters of the sample.

Rodgers et al made the important point that: "The general conclusion from this survey..... must be that there was no evidence that broad and well-defined "types" of Training Officer jobs exist, but different "levels" of jobs can be identified which are both meaningful and useful".

Following Taylor's fivefold subdivision of Training Officers (Training Director, Specialist, General, Full-Time, Part-Time), Rodger et al sub-divided levels as follows:

Level 1: Group Training Officer responsible for training throughout a group of companies

Level 2: Company Training Officer

Level 3: Establishment Training Officer

Level 4: Secondary or Assistant Training Officers who are responsible to another Training Officer.

This survey also revealed a series of problem areas common to a large part of the sample. Many Training Officers felt they were not fulfilling the jobs they had expected to fill, due largely to a lack of staff: this situation was worsened by the administrative demands made on them, particularly those from Training Boards. They also had difficulty in obtaining resources as training was often viewed by management as peripheral, low-status, function in the organisation. Negative attitudes to training were compounded by the difficulty Training Officers experienced in both identifying training needs and evaluating job performance resulting from subsequent training.

3. PHILOSOPHY AND TECHNIQUES

Rodger et al examined the need to both clarify the Training Officer's function and also its limits: "Training is a means of making better use of human resources in the organisation by developing people to meet the requirements of the job to be done". It should be viewed as one of a series of methods, which includes: re-structuring of jobs or work group, changes in equipment or system design. Any attempts to extend the expertise of Training Officers into broader human resource specialist roles is, they argued, to change the trainer into - in the majority of instances - a more exotic role that would be beyond the aspiration of all but a small minority of Training Officers. Effective human resource development cannot be done piecemeal: this requires the development of the total personnel function in the organisation. For example, the training of managers requires competence in 'people' or 'organic' skills which require: "sophisticated behavioural science knowledge and techniques and usually the ongoing application of organisation development activities".

Prior to the late 1960s the Training Officer was generally seen as the functionary who fitted individuals into pre-determined job requirements in an organisation by the application of formal training techniques. The human resource concept marks a profound change in the philosophy of training by accentuating the need to equate the expectations and potential of the individual to the requirements and values of the organisation. The trainer was considered to be one possible agent in the process of generating, developing and structuring change.

This growing interest in the use of the trainer as an agent for organisational change was developed in the work of behavioural scientists, largely in the context of organisational development. For example, Bennis (1969) developed a link between the traditional educational function of the trainer and the aims and methodology of O.D. in his definition: "O.D. is a complex educational strategy intended to change the beliefs, attitudes, values and structures of organisations so that they can better adapt to new technologies, markets and challenges and the dizzying rate of change itself". O.D. concentrated on values, attitudes, relationships and climate in relation to organisation demands, with the emphasis on experienced behaviour through collaborative activities (eg joint goals) and

a shared social philosophy based on democratic values, team management and mutual trust.

There can be little doubt that O.D. had powerful proponents in the training field at the end of the 1960s and on into the 1970s, particularly among consultants and academics, but it is notoriously difficult to gauge either the quantitative or qualitative effects that it had in the context of training applications within organisations. But it could be argued that by its very nature O.D. is likely to have a long germination period among managers before the actual effects appear, and any attempt at short term evaluation is bound to show limited results. Tranfield and Gill (1972) made a noteworthy attempt to quantify the use of O.D. in part of a research project in the British chemical industry: they sent out 600 questionnaires and had a 56% return (336). Their findings show a strong orientation towards the use of traditional methods: under the heading "Usedit/Taught others to use it", they found a scoring of 83% for on-the-job training: 84.6% for "teaching"; 88.5% for "lecturing". The scoring for "change" techniques associated with O.D. were relatively low: sensitivity training, 18.5%; T-group 6.6%; Blake's grid 11.6%, and a more hopeful 46.7% for job enrichment. But a broader aspect of their findings was the need for organisational-consulting skills for groups of trainers: 25% of respondents required to "increase their knowledge of available techniques if they are to maximise the opportunities inherent in their role"; a further 50% required training in O.D. techniques. In terms of the actual application of O.D. they found that only 12.2% of total respondents met the necessary knowledge and role performance criteria to take part in O.D. activities.

Tranfield and Gill also found difficulty in distinguishing between the difference in role between those carrying out a "change agent" function and those performing traditional roles, and also in determining the differences in activities between existing trainers who carry out a change agent role.

The Thakur et al study (1978) of the application of O.D. in sixteen companies and their literature search tended to confirm some of the difficulties illustrated by Tranfield and Gill's initial work. There was little general agreement on the functions of the O.D. practitioner in the actual organisational situation beyond the

use of words such as "change agent" and "facilitator", and a further problem of relating behavioural science theory to actuality with a tendency towards the "pre-packaging" of O.D. material with resultant transfer problems. An additional weakness was the initiation of activities by external consultants with a failure to use internal staff as effective maintainers.

Finally, there was the continuing problem of evaluation of results, partly, as Schein (1970) pointed out, arising from a common difficulty of determining practical criteria for effective organisation and "sparse" research. Considering these factors, there can be little doubt about the degree of difficulty encountered by the trainer in the initiation and running of an O.D. dimension in training, particularly if he has little or no access to senior management levels, or if senior management has a "course-running" conception of the training function.

A parallel theme which was, to some extent, related to the O.D. approach, was the increasing interest in interactive skills as a sensitising tool for the training practitioner and trainers in jobs having a social, or "people" dimension. This need for social skills in the training environment was already being realised through the studies and activities in the sphere of group dynamics, using the group as a learning medium in T-group training. The aim of a T-group (T for training), according to Smith (1969) is "to achieve increases in the trainee's sensitivity, diagnostic ability and action skill".

This approach to training was initiated in the UK by a study done for the BIM in 1956 by the European Productivity Agency, using American experience, particularly that of the National Training Laboratory. The BIM was instrumental in starting a course comprising, in the main, industrial training officers who, in turn, ran courses adding their own variations. The Tavistock Institute of Human Relations also ran a trainers' conference in 1957, the main function of which was to increase the efficiency of carefully selected members grouped in their "back home" jobs. The Tavistock approach, based on a long tradition of experience and research dating from Bion"s (1961) early work on group rehabilitation, was strongly related to the requirements of individuals in particular organisations.

Programmed learning, with its promise of accelerated learning, was another US import which was to have a long-lasting effect on training techniques, particularly in the areas of objective setting and syllabus structuring. Interest in the application of PL techniques started in the early 1960s with the establishment of Association of Programmed Learning. PL's close affiliation with psychology and pedagogy aroused a parallel interest in the sphere of higher education, where programmes were developed for both industry and training boards. Programmed learning was, and is, sold on its proven ability to cut the training time in certain situations. Evidence is also available, Romiszowski (1970), to show that it improves the use of instructor's time, allows for the decentralisation and standardisation of training, and increases effective participation in learning through self-pacing. A study done by Shirley-Smith (1968) on the attitudes of ITBs to PL illustrates the extent to which both interest in PL techniques and the application of programmes were gaining ground and were being encouraged by grant payment. The publication of the CTC of their memorandum on PL (1966), did much to support this trend: "We recommend that industrial training boards should consider establishing small teams of training specialists, well-qualified in job analysis and programme writing to analyse and cater specifically for the needs of their own industry in close coordination with training officers in individual companies". But there can be little doubt that the later over-selling of the commercial application of PL did much to damage the image of PL as a practical technique, although it still provides an essential armoury of knowledge and techniques for the practising trainer.

Gané (1972) provides an example of the potential of Programmed Learning, when allied to systems thinking, as a means of rationalising the training process in an organisational context. His model comprises seven steps through which the trainer helps achieve the objectives of the training function within his organisation. These are as follows:-

1. Define and clarify performance problems;
2. arrange them in order of the organisation's priorities;
3. analyse the problems in terms of 'mix', e.g. organisational change, selection procedures, training process;

4. produce analyses of relevant training population by concentrating on task difficulties and performance requirements: defining critical skills;

5. design training process (not necessarily 'courses');

6. assemble resources and implement training;

7. evaluate results and relate to 1 above.

Talbot and Ellis (1969) made a practical contribution in the UK to these twin themes of organisation requirements and economic considerations. They argued that Training Officers were problem solvers whose function was to operate in areas where there was: "lack of knowledge, preparation for promotion, adjustment to new organisational structures and unsatisfactory performance". They also argued that this expectation should be extended to cover the areas of both organisational and individual effectiveness and specified three functions of particular importance: (a) integration of management effort for the more effective use of human resources especially in the area of attitude change, (b) the need to work with management in the clarification of individual goals and the consolidation of learning requirements of managers as a group, (c) assist in the unfreezing of traditional attitudes to change ("the conditioning of the past"). Talbot and Ellis envisaged the new Training Officer developing from his point of basic training to work on the application of simple skills analysis, handling knowledge and skill analysis problems and then moving upwards in his developmental period to more complex organisational problems - situational analysis - and from there to organisational analysis starting with departmental review, culminating in organisational analysis on organisational development problems. They underline the importance of the costing and evaluation function of the Training Officer while making the point that the costing and evaluation of training is often beset with intangibles but no more so than functions such as research and development and sales promotion. An important distinction is drawn between "the cost of learning" - which is always present in organisational activities - and the cost of training. The function of the Training Officer in this area is not to show 'training pays, but rather to illustrate that the applications of relevant learning methods can be measured and

demonstrated in terms of: changes in learning times, changes in output before and after the application of new training process, improvements in quality and customer goodwill'. A central theme of the Talbot and Ellis work is their practice-orientated treatment of the cost-value relationship in training: "The art or science of the training specialist is to advocate those methods of training which, in the particular situation, cost a good deal less than the value they will achieve in terms of reduced learning time, improved learning and higher performance". They illustrate their approach by supplying a series of practical costing procedures and decision-taking criteria for the establishment of training budgets.

Mumford (1971) echoed this cost consciousness in the context of organisation-related performance: "There is always a temptation for those engaged in a service to become engrossed in the performance of their art at the expense of paying the proper attention to the value of their performance". He cited four main role areas for the training specialist: (a) the administrator responsible for the running of training and appraisal schemes, the application of learning theory in the organisation and the person who encourages managers to train and assists in the evaluation of training; (b) the exponent of training through the broad application of teaching rather than simply instructional techniques; (c) the diagnostician who presents alternative methods for the solution of problems and acts as an agent of change, selecting his tools from the behavioural sciences; (d) the manager responsible for training resources, their control and the delegation of their application, preferably in a participative style aimed at increasing the motivation of subordinates through the application of choice rather than traditional authority.

This need for the effective and relevant application of learning skills and their integration with the learning environment in a manner which utilised the learning potential of students and trainers was developed in the researched-based work of Davies (1971): the teacher was a manager of learning resources charged with the task of planning, organising, leading and controlling learning and of selecting learning strategies within the conceptual framework of educational technology. He broadened the function of the teacher from the formal classroom environment to that of problem-solving activist utilising the

concepts of educational technology to help: "ameliorate the problems stemming from the needs of an education and training system to survive, grow and develop the capacity to adapt and to manage change". Davies isolated three main functions of the teacher/trainer: (a) the definition of learning objectives based on the analysis of tasks, (b) the determination of motivational and learning strategies to meet task performance requirements and (c) controlling learning through the assessment of performance. This work of integrating learning and training activities extended the work of Mager (1962) and helped increase the demand for the establishment and clarification of behavioural objectives for training, particularly in the area of formal course programmes.

Davies also built on Humble's (1969) cyclical procedure of Management by Objectives to develop learning through a Management by Learning Objectives cycle. This comprised a fourfold cycle of individualised instruction: (a) organisational definition of objectives, (b) structuring of performance requirements, including a learning guide and assessment activities, (c) agreeing plan with student/trainee, (d) review of performance.

The need to incorporate the function of evaluating the effectiveness of training in the job of the Training Officer has long been considered an essential element in research studies and training literature, although it is generally accepted that this area owes more to the 'ought' approach than to the 'actual' of practice.

Hamblin (1974) perceptively pointed out that the question "can training be evaluated?" was a "nonsense question" since we are continually evaluating training and he re-phrased the question to ask "How should training be evaluated?" Traditionally it has been assumed in the training function that while it is relatively easy to evaluate operative training - as illustrated in the early work of Seymour in short cycle repetitive jobs - it is almost impossible to effectively evaluate other types of training, and notably management training and attitude change, because of either the time factor or the number of variables affecting the situation under measurement. The basic problem has been to structure a procedure which is both acceptable to management, and administratively feasible, and build it into the training function.

Warr et al (1970) developed such a procedure with the aim of measuring the effectiveness of the complete training activity. This approach comprised four levels: (i) 'Context evaluation' in which a decision is made about the relevance of training as a solution to an organisation's problem and training objectives set, where relevant; (ii) 'Input evaluation' where a decision is taken about the use of resources to attain pre-set objectives; (iii) 'Reaction evaluation' is the collection of information during and at the end of training or interpretation in relation to training objectives; (iv) 'Outcome evaluation' which measures the extent to which pre-set objectives have been attained. This latter level is made up of three stages: immediate - changes in the trainee immediately following the training: intermediate-job performance changes at the workplace; ultimately - effects at departmental and organisational levels.

Hamblin (1974) provided a detailed control procedure for the evaluation of training and illustrated the range of measurement techniques available for application at each stage in the procedural chain both during and after training. This chain had five main links: reactions, learning job behaviour, organisational changes, ultimate goals: "Training leads to reactions which lead to learning which leads to changes in the organisation which lead to changes in the achievement of the ultimate goals". The function of the Training Officer in these assessment and evaluation areas is generally considered to be twofold: (i) to help the direct trainer formulate objectives before training and to assist in the post training check; (ii) to help the organisation specify and control its training with particular reference to cost-effectiveness of training activities. Attempts have been made to apply evaluation techniques in specific situations (see Jones, Moxham, 1969) and to develop cost benefit analysis (CBA) as an evaluative technique. Hall (1976) has examined the ways in which CBA has been applied to determine costing and investigated its practical use as a decision-taking tool for organisational analysis and value-related measurement. However, there is little evidence to suggest that this essential function of the Training Officer remains little more than aspiration rather than a reality in most training activities.

4. TRAINING BOARDS AND THE PROFESSIONAL ORGANISATIONS

Recurring themes in the training literature of the late 60s and early 70s is of the Training Officer as 'change agent', 'facilitator', 'problem solver', 'O.D. consultant', and 'diagnostician': views which tend to diverge from the more basic approach of Training Boards in the same period. Differences could be expected since, as Dublon (1976) points out in his study of role trends in the T.O.s job between 1965 and 1975, Training Board views were published as a guide to both trainers and managers and therefore tend in the main to be conservative, relating to an expectation of basic practice in the traditional mode of: training assessment, structuring of training plans, resource organisation and implementation of training. This is reflected in the Construction I.T.B.'s (1968) definition of the T.O.'s roles as: identifying needs, assisting in the formation of plans and policies, getting agreement on training programme content, ensuring implementation and the regular review of programmes.

The importance of the human dimension was also being developed in official circles in the early 1970s: the function of the trainer, as Rodger et al (1971) had pointed out, cannot be viewed in isolation from the broader issues of human resource development within the organisation. This viewpoint was the central theme of a report by the Personnel/Training Sub-committee of the Joint Industrial Training Boards Committee for Commercial and Administrative Training (1972). They argued the case for "a'common core' of knowledge and skills which is a necessary basis for work in the field of human resources management" and, while acknowledging the need for specialised functional areas and "specific practitioner knowledge and skills", underlined the essential duality of "exploration and experience" and viewed behavioural science "as the most important single field of knowledge from which competence derives". The importance of this report for the trainer was their view of the trainer's requirements in the management of human resources. They accentuated the need for an organisation to provide the necessary skill and knowledge requirements for effective job performance to fulfil both the present and future needs of the organisation and to develop the personal capacities of individuals. They also argued the trainer's need for: "Sufficient understanding of practical methods and associated theory in relation to an organisation's overall objectives and policies and the other functional areas of human resources management" to be able to carry out a series of training functions. These were

as follows:

" (a) identify the purpose and place of training and development in an organisation;

(b) identify and assess long and short term training needs at organisational job and individual levels;

(c) establish training priorities, develop appropriate strategies and plans, and secure the resources necessary to meet these;

(d) understand the constraints and opportunities presented by the national education and training environment, and use available external resources such as those arising from:

- the education system
- government policies and the Industrial Training Act
- professional and other organisations

(e) advise on, establish and use procedures and techniques for the induction, appraisal and development of employees

(f) design and prepare programmes of training and development based on

- requisite job, task and/or skills analysis
- performance assessment or appraisal
- specified training objectives
- appropriate learning methods and aids
- available internal and/or external resources:

(g) understand the practical difficulties of organising the training and development of particular categories of staff throughout an organisation, and secure co-operation in overcoming these

(h) prepare and work within agreed training budgets

(i) develop methods of validating and evaluating training and development activities within the organisation."

They also suggested guidelines for the development of professional competence but stressed the importance of tailoring programmes to the needs of both the individual and their organisation.

Cotgrove and Johnson (1973) carried out an in-depth study of training adviser roles in the Hotel and Catering Industry Training Board during this period and based their finding on an extensive series of interviews with relatively autonomous HCITB training advisers. An important factor in this study was the authors' sensitivity to the multiplicity of role perceptions on training existing at any one time in an

organisation and the resultant difficulties experienced by both board training advisers and practising training officers in attempting to strike a balance between conflicting pressures and changing expectations: particularly those emanating from managers with whom trainers were in daily contact. They found that training advisers lacked direct authority and the ability to prove the benefits of training through a lack of relevant objective evidence. This resulted in their clients having an absence of motivation to train: a condition which advisers shared with many of their training colleagues in industry.

Cotgrove and Johnson isolated three main elements in the roles of the training board adviser: (a) the administrative role comprising such functions as clerical work, appraisal of training activities and overseeing registration, (b) relational activities, which included the establishment and maintenance of an effective working relationship with their clients, motivation and, where necessary, the changing of attitudes, and (c) the diagnostic role, assisting in training needs analysis, giving specialist advice and helping clients to develop training programmes. A major conclusion of the study was "the shift in emphasis from inspection to advice", suggesting a need for interpersonal skills associated with the professional requirements of a social worker.

The main attempt by a Training Board to determine the job content of T.O.s in industry was carried out by the Engineering ITB in the early 1970s. The findings, based on a representative sample of 500 full-time and part-time T.O.s, underpin in some respect those of Rodgers et al, particularly in the areas of status and function. The main route into the job for over half the sample was from the craft and technician categories or from instructor or supervisory posts. The low status of T.O.s in the engineering industry was apparent from the returns on reporting levels: only 10% of T.O.s in the sample reported to the managing director. Areas of training responsibility were concentrated in the supervisor and operator categories with less than half of T.O.s participating in management training.

The research questionnaire itemised fourteen job areas derived from those listed in the joint board publication Training for Human Resources, (see page 257) in their checklist. Returns (Table 1)

showed that few of the T.O.s covered all the listed functions; the average T.O. being responsible for nine out of the fourteen items, the most common being: advising on the establishment and use of training processes and techniques (83%); organising training for specific categories of employer (83%), and the design and preparation of training programme (80%). A majority of T.O.s had no active involvement in manpower planning, budgeting, or the costing of training, and only 40% were responsible for a training budget. The report makes the point: "The two items most frequently mentioned by all officers, are "organising the training of particular categories of staff and, advising or establishing, and using procedures and techniques for the induction, appraisal and development of employees". After this point of similarity with both full-time and part-time training officers there is a difference in job items with 90% of full-time staff working on the design and preparation of training programmes as against 65% of part-time training officers. Heads of training departments were very circumscribed in their activities and "are rarely of managerial status - do not have access to top level management, and are seldom involved in complex company forward planning, financial control, or even manpower planning".

The following items had low ratings as job description items: identifying future manpower requirements (43%); preparing budgets for manpower forecasts (36%). Assessing the cost-effectiveness of manpower planning and recruitment and selection services were bottom of the list with a 14% activity rate for full-time T.O.s and 24% for all T.O.s.

One aspect of this study which gives cause for concern is the extent to which the function of many training officers appear to be based on the demands of their training board and not on the specific training needs of their organisation. The report makes this point: "The present band of training officers appears largely to reflect industry's response to the 1964 Industrial Training Act, for their main role appears primarily to be that of liaison with the Industrial Training Board". The organisational implications of changing perceptions in the training officer's role will lead to changes in the expectations from training specialist: "..... just as boards are shifting their emphasis away from day-to-day training needs of individuals, in order to take a more comprehensive view of the organisation's future development and needs, so too will the company training specialist need to adopt a wider outlook". The very pressures which led to the formation of training boards and their drive for industry-wide standards appears to have resulted in some

organisations structuring training as a defensive administrative procedure rather than as a function having a positive contribution to make in the wider sphere of human resource development.

The report states that the impetus for a change must come from employers who need to improve both the status and calibre of their staff and increasingly use their training specialists in the broader function of human resource development at organisational level: "Many of the activities which the joint board report regards as vital elements of a training specialist's job are not among the responsibilities of the people in the survey, less than half of whom deal with the two areas which appear to be the core of the wider role advocated: management development and organisational review and analysis". However, the report ends on a more hopeful note: "Most members of the sample seek a long-term career within the human resources function, so training and development is essential to help lift some of the training staff from a routine of day-to-day training, instructing and administration".

The tendency for training boards to be conservative, and possibly more realistic in their expectations, is illustrated by the publications of the Local Government Training Board (1973), the Chemical and Allied Products Industry Training Board (1973), and the Carpet Industry Training Board (1975).

The LGTB isolated three main roles related to levels of training officers: (a) the overall function of advising on training policy, developing training plans, recruiting, establishing and running of training programmes and general administration, (b) the implementation of training activities and administrative duties, (c) the person who spends the greater part of his time in the instructional function.

The Chemical and Allied Products I.T.B. established a nine-stage approach to the training officer's job in the form of a training cycle: the first part of the cycle is the creation of a training policy (1); from this training objectives are defined (2), and a training organisation established (3), training needs are then specified (4), and programmes prepared (5). This stage is followed by the implementation of training (6), a comparison of results (7), and a review and assessment of efficiency (8), leading to the beginning of a new cycle (9). The limited research survey on which the Carpet ITB based their finding shows a grassroots situation in which the function of training is peripheral to management activities and is carried on by an ageing and diminishing workforce with more than

half of the sample over 40 years of age and suffering from relatively high labour turnover in the under-40s age group. The survey uncovered a low status training function lacking involvement in manpower and training policies, with restricted activities and few relevant responsibilities: training was "a fringe activity".

The professional organisations - the Institute of Training Officers and the Institution of Personnel Management - tended to take a viewpoint which was essentially a compromise between the 'change agent' and 'consultant' roles and the more conservative traditional approach of the training boards.

The Institute of Training Officers (now re-named the Institute for Training and Development) used the human resource theme as a central element in their definition of the training role in the early 1970s. The I.T.O. - established in 1964 to "promote and encourage the development and diffusion of knowledge about the practice of training in industry, commerce, appropriate branches of the armed services, and civil and local authority services" - issued a guide (1972) for the training of members and potential members. The I.T.O. document viewed the training function as "an agency and a catalyst of change in human resources" which occurred through the medium of: education for the acquisition of knowledge necessary to come to terms with our environment; training to meet specific job requirements and, development as a preparation for future task or job requirements. In these circumstances the T.O.: "must be able to diagnose as well as analyse; have a willingness to be involved at workplace levels, plus an ability to grasp the concepts of manufacturing, or marketing, or service processes or procedures; be able to cooperate with, and to be given the confidence of all levels of people in the organisation so to convey to them views and recommendations, clearly and simply". The skills necessary for the new T.O. were reflected in the model skills specification with the I.T.O. supplied for a new T.O. These skills requirements were as follows:

1. Teaching and advisory skills which included not only formal instructional skills but also the broader application of learning theory to the training requirements of their organisation and the preparation of learning material.
2. Administrative skills necessary for the organisation and running of training courses and the maintenance of records and I.T.B. schemes.
3. Analytical skills including the determination of educational course entry standards, the identification of job knowledge and skill

performance requirements and the ability to interpret statistical data for training needs analyses.

4. Diagnostic skills necessary to develop training objectives for the organisation and the skill necessary to distinguish between strategical and tactical planning.

5. Evaluative skills necessary to measure the effectiveness of training with the ability to design and use simple measuring techniques and interpret statistical feedback information.

The I.T.O. recognised in their document that training function should be "an integral part of the management process" and as such should be integrated into decision-taking procedures in the organisation.

A survey of trainers in Britain and overseas (see Frank (1975)) was undertaken by the School of Management of the University of Bath with the assistance of a training journal (Industrial Training International, now merged with the Journal of European Training to form the Journal of European Industrial Training) and the (then) Institute of Training Officers.

The survey was based on a four-page questionnaire made available to readers of both the I.T.I. and 'Training', the journal of the I.T.O.: there was a total of 326 completed questionnaires in the self-selected sample comprising both part-time and full-time T.O.s with more than half of the respondents in manufacturing and about one-fifth in catering-related industries. The central feature of this survey was the attempt to determine the background, responsibilities and job areas of the T.O. as seen by the job holder: fourteen items were also used in a job description list, with job items somewhat similar to those used in previous studies.

The major manpower categories of training responsibility in the survey were as follows: Clerks, Machinist and Typists (80%); technicians (75%); professional and administrative staff (70%). Major areas of 'common denominator' training activities were:

- identification of organisational and individual training needs (short and long term);
- design, preparation and development of training;
- organisation of training and development activities.

A significant percentage of the sample (66%) were supplied with agreed training budgets, approximately 50% of the sample prepared

job and personnel specifications and assessed manpower requirements (a relatively high percentage in comparison with previous surveys), with 20% engaged in the cost-effectiveness of manpower services (manpower planning, recruitment, selection). Other common functional areas were: instruction, administration and record keeping (80%) and a relatively high percentage (50%), in comparison with other similar studies, engaged in "Organisational Review and Analysis and Organisational Development". The key responsibilities considered to be "most time-consuming and important" were the identification of short and long term training needs, the design, preparation and development of training programmes and the organisation of training and development. Respondents did not take the pessimistic view of management indifference to training which is normally associated with the T.O.'s job: 69% 'disagreed', or 'strongly disagreed' with the statement "Management is indifferent and apathetic towards training". But on the question of status, 46% 'agreed' or 'strongly agreed' that "The T.O. lacks authority and executive power" and Frank (1975) in reporting on the study states "From the information provided it could be deduced (possibly erroneously) that about half the respondents were low down in the professional hierarchy". The T.O.'s traditional interest in the difficult area of evaluation was also reflected in the survey: 69% 'agreed' or 'strongly agreed' that "It is difficult to evaluate training".

This survey, despite the limitations imposed by a self-selecting sample, tends to reinforce the findings of both the Rodger et al and EITB studies that there are broad areas of common function in T.O. jobs, but also underlines the point made in the Rodger et al research that it is often helpful to think of the job in terms of level or category of operation (eg Management or Technical) when considering detailed functions and responsibilities. Another important theme which the Bath study has in common with other studies is the importance of the administration and recording activities as a time-consuming and often frustrating part of the T.O.'s job.

A joint document comprising a series of short papers on 'policies and approaches' was produced by the Institute of Personnel Management and the Institute of Training Officers in 1975 to represent the views of professional training and development specialists and to both clarify and justify the function and potential of training to managers.

The document strongly argued the case for relating the training requirements of the organisation to the organisation's corporate plan. The task of training is to "identify the changing or additional skills or knowledge needed to achieve the desired results and the potential sources of that skill and knowledge, which may include new recruitment as well as the development of existing staf .....". This will, it argued, require an evaluation of resources necessary to meet defined needs and the subsequent feedback of requirements to policy makers for the identification of changes in policy and organisation. Policy-making comprised the implementation of three major activities: (a) collaborative detailed planning with management, (b) the joint implementation with managers of training requirements, and (c) the evaluation of training activities against organisational and job requirements. The document lists the points justifying the establishment of training policies and activities, defining the factors that policy should cover in specific categories of employee, (director, managers, training and development specialists and the individual).

The policy issues that the organisation may deal with in the training and development specialist's job are stated as follows:-

" (i) definition of the role of the training and development specialist appropriate to the particular organisation at its stage of development;

(ii) the concepts governing the approach, eg. the training and development function upon which the role is based, eg. emphasis on design of self-directed learning and consultancy as opposed to training and instruction;

(iii) the type of contribution that can be expected from training and development;

(iv) the extent to which the training and development function will exercise functional authority as opposed to providing advice and services;

(v) definition of their role in relation to line manager and functional specialist;

(vi) responsibility for training standards".

The document also notes both the wide variations in the roles of training specialists and the narrow specialisms which may inhibit

effectiveness and suggests the following broad list of possible areas of common responsibility:

" (i) Helping management to identify the needs and problems of the organisation and those who work in it;

(ii) identifying where and to what extent these needs or problems have a training component;

(iii) identifying suitable agencies of learning;

(iv) devising methods of learning;

(v) implementing training in a close relationship with line managers;

(vi) monitoring the learning process and designing methods of evaluation;

(vii) taking part in the evaluation of results;

(viii) planning the future activities of the training function".

After listing these requirements the document goes on to underline the point that the needs of professionls go beyond the requirements of training standards, skills and knowledge: they demand a knowledge of management and an understanding of organisational behaviour.

In their section on the organisation of training and development, the authors accentuated the need for the training function to be designed and structured so that it is represented at all levels of management, giving the trainer access to planning and decision-taking activities. The manager is considered to be an essential participant as well as the most influential individual in training activities, particularly in the example he gives to his subordinates, although he may not have the necessary skill (or time) to recognise and carry out his training responsibilities and will often require the assistance of the training specialist. The problem of coordinating human resource management is also discussed and the forms of linkage which may be used between functional specialists. The document noted the advantages of linking the "task" and "people" elements within organisations by the use of multi-disciplinary teams (eg marketing, sales and training), where training techniques can be allied to the professional expertise of the specialist. The joint IPM/ITO document

was conceived as a discussion document on the role of the training and development specialist, particularly at the policy-making level, and represents an attempt to both justify the contribution of the professional trainer in the context of his contribution to organisation effectiveness, and the main areas legitimately considered to be his concern. The professional levels of expectation which the document outlines are neither over-ambitious nor contentious, but the expectations expressed in the area of relationships between corporate planning and training are, as the authors realise, more in the sphere of the 'ought' than in the reality of the 'actual'. But it could be argued that it is the function of professional organisations to challenge current practices and, by supplying standards, extend the demand for their implementation.

5. CORE COMPETENCIES: EARLY DEVELOPMENTS

The 1960s era is marked by the search for two main goals in the sphere of training. First, the need to define and close the gap between what leaders in the field considered to be the 'ought' in terms of good training practice as against the 'actual' of reality. Second, the establishment of an all-embracing system or model which could be used as the basis for the derivation of basic skill and knowledge requirements of Training Officers. This latter goal, it was hoped, could lead to the structuring of core competencies for training officers, in a wide variety of operating conditions.

A major attempt to bridge the gap between the 'ought' and the 'actual' is illustrated in the work of American practitioners during this period, particularly that of Craig and Bittel. Their Training and Development Handbook (1977) provided a fruitful source for students of the developing training function and resultant core competencies as viewed largely from a practitioner viewpoint.

This publication originated from the American Society for Training and Development, formerly the Society of Training Directors. The Society, which had its origin in a merger in 1945 of the National Association of Foremen and the National Association of Sales Training Executives, had made continual attempts to define the Training Director's job (a term similar to our Training Officer) and had encouraged a series of studies aimed to this end. Craig and Bittel quote the Belman and Bliek study carried out in 1959 and probably the first in-depth study attempting to define the job of the training director. The Belman and Bliek questionnaire listed

1208 tasks, of which respondents were asked to denote major duties and responsibilities. These were indicated in 255 returns as: "development and preparation of training programmes - 41.6%; administration of training - 19.2%; instruction responsibility - 8.9%; training advisory role - 6.7%; evaluation of training - 4.4%.

Craig and Bittel also included the results of a study of Reith on factors influencing the content and development of the trainer's job. These were listed as follows:

1. Factors influencing establishment of training function:

   (i) type of industry (static or dynamic state of technology);
   (ii) legislation;
   (iii) ability of organisation to define objectives and policies and how these policies are related to the training function;
   (iv) capital/labour ratio: level of mechanisation;
   (v) labour market (skill requirements, geographic area covered);
   (vi) customer's requirements;
   (vii) size of firm;
   (viii) rate of technological change in firm;
   (ix) attitude of senior management;
   (x) history of the training role.

2. Variables affecting the Training Officer's job:-

   (i) size of organisation;
   (ii) single or multi-site;
   (iii) part-time, full-time;
   (iv) specialist (e.g. operative or management), generalist;
   (v) reporting levels;
   (vi) acceptability of consultancy or coaching role;
   (vii) education qualification and past experience;
   (viii) administration;
   (ix) management style;
   (x) power of Trade Unions.

Reith also illustrated what he considered to be the long range organisational factors determining change in the Training Officer's

future roles. These include: market and technological changes, changes in business systems and processes, availability of external training resources, and changes in training practices of competitors.

The need to ensure a close relationship between the organisation and the training function was also underlined by Warren (1969), who viewed training as essentially an activity "to bring about controlled behaviour change within an organisation": he deplored the tendency to develop structures without clarifying functions. Training, he argued, must meet three requirements: (a) it must make an economic contribution to the objectives of the company, (b) be rooted in the managerial process, and (c) make a measurable contribution to organisational goals. Warren's training system comprised five elements:

1. Research. This included the collection and investigation of techniques and data; the ongoing examination of training aids and programme structures.

2. Analysis. The identification of organisational training needs and their projected costs; the identification and specification of a job behaviour or performance needs; the analysis of tasks to relate training to job performance; the consideration of alternative methods of enhancing job performance.

3. Development. The design and production of training specification (which may include formal training programmes); instructional design and the application of training techniques.

4. Operations. The presentation and administration of training activities and the maintenance of training systems;

5. Evaluation. Measurement of performance and programme efficiency.

The training system of Warren rested on formalised training roles established to help fulfil organisational and job-centred training requirements and lacked, in common with other approaches to training current in the 1960s, an appreciation of the needs of trainers: the human resource dimension.

The view of the training function as part of an overall human resource requirement was a central theme in the important contribution of Nadler (1969) and Lippitt (1967) in the US, and marks a fundamental shift in thinking from job and organisation-centred training to

trainee-centred training. Nadler, developing his earlier model of roles and competencies, argued that the trainer was emerging as an internal consultant within his organisation and had three main areas of expertise to offer: (a) the learning specialist, (b) the administrator, and (c) consulting specialist on organisational problem solving. He later (1970) extended and completed his concept of the role model in the wider context of human resource development. The 'learning specialist' role comprised the function or sub-roles of: instructor, curriculum builder and methods and material developer. The 'administrator' sub-roles were seen as broad functions entailing activities both internal and external to the trainer's organisation: the 'administrator' operated as a 'human resource developer of personnel, who supervised training programmes, arranged budgets and helped maintain community relations'. Finally, the 'consultant' role was that of the training expert stimulating training activities (the 'advocate') and acting as 'change agent' within his organisation.

Roberts, quoted in a major American Society for Training and Development Study, (1978), tended to support Nadler's early model in a study which described the knowledge, skill, experience and educational requirements of training officers but, he concluded, 'much more experience, experimentation, and research is needed before a single set of valid standards can be established for entrance into the training field or for performance in it'.

Future trends in training and development were projected by Lippitt in the 1960s as: (a) training would require to be increasingly proactive rather than reactive, (b) trainers must learn to make organisational analyses and interpret the training implications of their analyses for management, (c) trainers must become communication linkers within their organisation, (d) they must recognise the continuous presence of change and realise that motivation in the changing environment will be increasingly 'self' rather than 'organisation' centred and, (e) 'organisational objectives, individual performance objectives and training objectives will need to be integrated'. The implications of these trends for the trainer would be: the focus of 'helping people learn how to learn'; increased participation and control by the learner in their own development and in the design and structure of their training programme. A central theme of Lippitt's approach was that trainers should be 'managers of training and development resources, and less

as teachers'.

Nadler's conception of the Training Officer as being closely related to the managerial change process was cogently argued by Boydell (1970) in the UK: he saw the need to extend the training function beyond what he termed the traditional pattern of activities contained in the C.T.C. recommendations to those reflecting the actual functions emerging from developments in the Training Officer's job situation, particularly in situations of accelerated change.

Boydell used the term "practitioner competencies" to cover the traditional functions and stated the need for both 'leadership' and 'organisational change agent' competencies. The former, he argued, arise from the Training Officer's actions as an informal leader who has the tasks of planning, selecting, directing and coordinating training activities: "Normal management functions in respect of his resources and subordinates". The latter, organisational change competencies, emerge from the Training Officer's function as an individual responsible for assisting the organisation in its fulfilment of organisational objectives through behavioural change. The skills and knowledge for developing change are, he argued, necessarily those of communication, attitude change, knowledge of motivational requirements. The natural extension of traditional "practitioner" competencies should therefore lead into "assisting in the organisational development process by identifying the need for planned change".

This orientation towards organisational requirements was being reinforced by American training literature in the 1970s, and particularly through the ideas of Otto and Glaser (1970), training, they argued, "refers to the teaching/learning activities carried on for the prime purpose of helping members of an organisation to acquire and apply the knowledge, skills, abilities and attitudes needed for that organisation to carry out its mission". The trainer has a five-fold function: (a) learning specialist optimising learning at the lowest possible cost (the "dollars and cents approach"), (b) he provides an unbiased viewpoint as a systems analyst, (c) a communicator interpreting analyses into learning material, (d) a trusted consultant in areas of change, (e) an administrator managing training resources and keeping records.

Odiorne (1970) endorsed the economic approach to the training function: "learning theory and psychology can tell us how to teach, economic analysis can tell us whether or not we should train at all". The major function of the trainer was as an agent of change: this requires an awareness of the business environment and the factors which affect it with the continuing orientation towards growth and profit. He accepted that training must be based on job behaviour in relation to organisational requirements, but questioned the use of sensitivity training as inconsistent with "business and the economic world we live in". Odiorne defined three major role orientations: (a) adviser, (b) service, and (c) operations. The adviser carried out original research in his organisation, kept abreast of external and internal events, interpreted the organisation's training objectives, conducted training audits and issued training reports. The 'service' orientation related to running the training facilities and supplying a technical training service, including job training analysis and supplying a response to special requests for training. 'Operation' included the development of training plans and programmes and the selection and training of trainers and instructors; the running and evaluation of courses and general work of administration. The essential role of the trainer was to service the gap between perceived needs and the actual organisational situation within given economic constraints.

The economic argument was underlined in the UK by Bury (1971), the spokesman for the Confederation of British Industry: "The training function must expect to be judged primarily by the same criteria that govern any kind of management activity, namely,its contribution to the efficiency, productivity and cost-effectiveness of the organisation". This primacy of economic objective, Bury argued, could only be fulfilled at the level of the individual organisation by the clear definition of standards and the careful selection of training methods.

Dublon (1976) made a noteworthy attempt to examine and collate changes in the roles of training officers in the 1966-76 period by tracing role changes as illustrated in the training literature and research of that period with particular reference to the aspects of conceptual developments and practice: the former, he suggested, was changing at a greater rate. The initial part of the survey was devoted to the

examination of the variables which affect how the training officer functions in the work situation: the conflicts that are generated by 'role desires' - "the wishes of the definer in connection with the role" - and the role definitions as enforced by the power of the organisation's managers in the socio-political sphere. Dublon argued that the training officer has the power to alter given roles by "acceptance, credibility and performance". He illustrated the role definition processes by showing some of the interacting, and sometimes conflicting, factors which go to determine the training officer role: Idea Source Influence (books, articles); Environmental Influence (the socio-economic-political situation); Organisational Power (top, middle management and employees); Statutory Power; the influence of the training officer.

Dublon developed a matrix to show changes in perceptions of the training officer roles by using a threefold time sub-division (mid to late 1960s, early 1970s and mid 1970s and, using this timescale, related it to four sources of information (journals, training board recommendations, research, training officer's perceptions), as follows:

1. Mid to late 1960s

   Journals: Training Officer functioning as teacher/educationalist, and administrator.
   Training Boards. Identifier of training needs, adviser, implementor.
   Research. Mainly administration and instruction. Very varied roles but should develop towards O.D.
   Training Officers. Reactive, advising role, focus for grant activities.

2. Early 1970s

   Journals. Low status but potential for consultancy activities.
   Training Boards. Manager of learning. Training adviser but sometimes instructor.
   Research. Low status, low credibility. Require to develop advisory, diagnostic, relational and administrative roles.
   Training Officer. Minimal authority, autonomy, or desire for change. Reactive, inspectorial role.

3. Mid 1970s

   Journals. Internal consultant who must earn influence through ability. Development of client/consultant relationship with

managers. Eases organisational change.

Training Boards. Formulates training plan. Management development. Advises, assesses, implements and administers training.

Research. Low status, low level, undermanned function.

Training Officer. Increasing functional autonomy. Catalytic role. Extending towards management development but consultancy role lacking through absence of organisational support.

Dublon traced role definitions as they developed in articles in training journals, and illustrated these developments in graphical form. They showed a: "steep climb into consultancy and advisory roles at first, but later came down a little as the role itself was found to be so lacking in the ability to reach this almost esoteric goal". The graph also illustrated the very limited change in the traditional applications of the training officer's roles, particularly in the instructional role.

The role definitions emanating from the ITB sources were, with a few exceptions, very traditional with a minimal consultancy element, although Dublon highlighted a slight trend toward increased training officer power in policy determination. Dublon concludes from this literature search spanning the mid 60s to the mid 70s

> while being neither even nor clearcut, will be for the training officer to become increasingly an internal consultant: given that the incumbent can demonstrate his ability to enhance organisational performance and so gain credibility. But he underlines the need to gain a balance in our analysis of training officer roles by the investigation of organisational expectations, emphasising the importance of manager/training officer relationships.

6. CURRENT DEVELOPMENTS

A series of studies designed to determine the actual job of the trainer, as perceived by the trainer, was launched in the US during the mid 1970s. The American Society for Training and Development's Professional Standards and Ethics Committee had issued a detailed manual (1974) for its members suggesting books, articles, etc. for the self-development of members. This manual was based on a job framework comprising six phases:

' - Needs and problem identification;
- Objective Planning;
- Training Design;
- Development of Training Materials;
- The Training Effort;
- Evaluation and Follow-up'. (Pinto and Walker 1978).

The manual also gave advice on training competencies in the areas of communication and management. The ASTD Professional Development Committee updated and validated this material in 1976, developing a 'preliminary role model of training and development competencies' in the form of role categories which were, in some respects, an extension of the Nadler (1970) model (Learning specialist, Administrator, Consultant): the ASTD competencies model, which was to serve as a framework for a later study, was as follows:

' - Professional competencies (eg understanding training's role in society and the scope and structure of training operations);
- Consulting Competencies;
- Programme Managing, Developing and Administering;
- Learning Facilitating;
- General (eg thinking, confronting, people problems, counselling)'. (Pinto and Walker 1978).

A series of Canadian task groups was also independently identifying and developing a model of core competencies for the Ontario Society for Training and Development (Kenny, 1976). The OSTD produced a detailed core competency model based on the practitioner experience of their Professional Development Sub-committee members, also using: the results of the Canadian Public Service Commission Survey; the model proposed by the US Civil Service Commission (see Chalofsky and Cerio (1975)) and the ASTD model. The OSTD model was based on eleven areas of core competency comprising: learning theory, person/organisation interface, communication, administration, group dynamics process, manpower planning, training need analysis, course design, training equipment and materials, teaching practice, evaluation. It was argued that an 'organisational trainer' had four main functions: instructor, designer, manager, and consultant. A detailed knowledge and skill requirement was structured for each function. This consisted of a listing of four 'descriptors' outlining

the content of the training needs associated with each category within core competency areas. For example, it was assumed that the Manager category was the only one requiring a 'descriptor' for the administration core area, while the evaluation area a separate 'descriptor' for each of the four categories of training and development personnel. Although it was appreciated that there would be an overlapping of areas between the training needs of each of the four categories.

The major study into the actual job ('What do training and development professionals really do?') of trainers in North America was carried out for the ASTD and reported (Pinto and Walker (1978)) in what is probably the widest survey ever carried out on roles and competencies in training and development. The report on the study (based on 2790 returns from a 14,028 sample, with each questionnaire containing 92 multiple choice items and essay-type questions) aimed to 'determine critical roles and competencies of training and development practitioners'.

The study ranks the top 25 and the bottom 25 job items (tables 2 and 3) in relation to their median frequency in a total of 106 items. The most common activities include: programme design (1); establishment and maintenance of good working relationships (2); the design (3) and implementation of training programmes (4); the application of adult learning theory (5). The evaluation of training, while in the top 25, is ranked 14, and the identification of training and development needs is ranked a relatively low 16, one item in front of budget preparation (17). The projection of future training needs is the final item in the top 25 items: illustrating the continuing gap between the perceptions and activities of practitioners and the expectations of what trainers 'ought' to be doing.

Notable, if unexpected, inclusions near the tope of the ranking list are the factors of human development ('Apply concepts of human development and growth in designing training and development programmes') which ranks number 6, and counselling ('Counsel with employees and supervisors on training and development'), which is ranked 9. There are some surprises in the bottom 25 rankings: 'Technique: programme instruction/self-instruction' is at the bottom of the table, while the item 'Identify training implications prior to implementing other personnel programmes (benefit programmes,

recruit training; labour relations, etc.)' is ranked 22. The function of the trainer as a link between formal education resources and the participant's organisation is also ranked very low (18). The need to interpret statistical data is ranked 12 in this bottom group, and sensitivity training ('Technique; laboratory education/sensitivity training') is ranked 9, possibly illustrating either a decreasing interest in these techniques or a gap between its literary popularity and its applicability as viewed by grassroot practitioners.

The ASTD report also provides a four-part framework for the definition of roles and competencies which assumes a relationship between existing professional activities and the core competencies necessary to carry out these activities. The starting point of this framework is the broad background factors within which the trainer functions, these include: educational background of the trainer, technology and organisational factors (eg size), previous experience in training. The second part of the framework defines the 'work behaviour' expected from the trainer from which the content of the third stage is determined in the form of 'roles' established from the grouping of related activities which are based on the statistical analysis of job factors collated in the study. The final part of the framework - competency requirement (skills, knowledge, ability) - is determined by examining the 'roles' isolated in the preceding stage. This framework reverses the traditional format of commencing with a role model, or hypothesis, and then attempting to fit the job into the model.

This study is essentially an empirical analysis of what trainers perceive as their activities and excludes any attempt to determine or define what they 'really' do, what they think they 'ought' to do or what they 'plan' to do. But it supplies statistical evidence to support the hypothesis that there is a training and development 'generalist' and extends the argument for the use of core competencies in the job of the trainer beyond the area of the 'ought' into that of the 'actual'. In covering the 'actual', with the broad band of criteria and fund of grassroot information, it also points the needs for in-depth analysis in three related

areas: (a) what is the content of the broad band of common factors as perceived by the practitioner? (b) how does the 'actual' of the trainer relate to the expectations of management? and (c) what are the factors that determine effectiveness and resultant acceptability in the context of the organisation and the individual trainer's job?

A major step forward was taken in the UK by the setting up of the Training of Trainers Committee, comprising industrial, educational, professional and government representation. The Committee was established by the Training Services Agency (now the Training Services Division) of the Manpower Services Commission with the following remit:

> 'to consider the role, relationships, training needs, and current training of those staff who have specific responsibilities for training, and to make recommendations to the (TSA) Director of Training on:
>
> (a) the pattern of training required for such staff;
>
> (b) the provision of such training;
>
> (c) appropriate means of its evaluation and, where necessary, of its oversight and approval.'

The Committee decided (Discussion Document 1977) at an early stage to concentrate on core competency programmes' for both new and existing staff, a variety of kinds of which could be approved against existing training functions ('where are we now?') to 'encourage steps which could make for more effective roles for trainers, and support of training by and in organisations' and 'to help ensure that training specialists are equipped to be credible and effective in their roles'. While the Committee was interested in the need for the definition of career requirements in training as a profession, their central theme was job-performance centred in the context of the individual training officer's organisation. They accepted the view that, 'there is no one ideal model for a training officer or for his or her training' but, nevertheless, felt that there should be broad guidelines and standards based on an analytical framework to assist in the definition of future training needs even given the wide diversity of titles and roles currently existing in the training field.

The Discussion Document of the Committee outlined the main developments in training which they took into account in the framing of their proposals, these included:

- a move from a teaching/training orientation to a learning one
- a move from merely focusing on individual's learning needs to those encompassing group and organisational learning needs
- a shift from the concentration on learning in a mainly training environment to seeking learning opportunities in the organisational environment
- a shift of emphasis from merely acquiring skills and knowledge to applying them in the work situation.

The Committee were clearly influenced in their work by three closely related factors which they felt were essential to the formation of the role requirements of individual trainers in their organisation: (a) the organisation of the training function (including levels of operation, administrative requirements, relationships with other functions, the allocation of training responsibilities), (b) attitudes to training in the organisation (levels of commitment, expectations, actual power of the incumbent), and (c) ability and expectations of the trainer (his knowledge and experience, attainments, potential, motivation, aspirations, response to change). The document goes on to summarise the main elements which they considered the training job does, or should, contain and summarised them as follows:

'(a) A Direct Training (instructor/tutor) element. Here the trainer designs and/or implements training activities to meet specific demands, which can be at any level. Often, for the training officer, it consists largely of off-the-job, formal training in a special location, providing direct training for the organisation and the individuals in it. It generally assumes technical competence and experience in the subject area.

(b) An Organising/Administrating element. The element involves providing a framework for training activities; analysing training needs; building up plans and negotiating plans with other parties. These plans may include 'package' training material of various kinds, as well as internal or external courses and programmes of combined training and experience.

(c) A Determining/Managing element. This element is distinguished by the exercise of effective structural power at a senior level in establishing training policy, identifying and meeting training needs and preparing and implementing plans and programmes. A determinator effectively controls training activities. He would usually be involved in wider manpower issues and be in close touch with company developments and problems.

(d) A Consulting/Advisory element. In this element the trainer essentially provides an enabling service to management and others at any level. He is a source of expertise and information, a supplier of ideas, an asker of questions and a reflector of views, and so integrates and contributes to, but does not necessarily control, plans and activities. He works largely in and around the organisation, is involved with jobs and structures and systems as well as with people; designing learning in and through jobs and tasks as well as through traditional training off-the-job.'

They also argued that, while there would be variations in the roles as between trainers in different organisations, it was possible to isolate features common to all training roles. These were instanced as: (a) most trainers can make contacts at various levels within their organisation which gives them an opportunity to gauge and influence grassroot views and reactions, (b) they are in a position to define or assist in the definition and solution of organisational problems, (c) trainers are essentially in the learning business ('They should be the training technologists in their companies'), and (d) an essential part of their function is the 'people' dimension: manpower and relationships.

The Committee developed a series of Core Competencies from their working hypothesis, isolating four role element areas: (a) Direct training, (b) Organising/Administrating, Determining/ Managing, and (d) Consulting/Advisory. Each role element was further sub-divided into knowledge and skill requirements. They also added a series of common 'know hows': learning ('should uniquely characterise the trainer'), people, organisation, trainer roles, diagnosis and problem solving, but reiterated the point that 'For different groups and individuals these (role elements) will need covering in different ways and to different levels'.

The first report (1978) of the Training of Trainers Committee set out to provide a 'framework for action' based on the need to have 'credible and effective' trainers by extending the Core Competency concept of the earlier Discussion Document and suggested the development of standards and the establishment of a structure to implement and monitor their application. But their main concern was: 'how to assist anyone entering the training field to be effective as soon as possible and also to ensure that existing staff can acquire any additional skills and knowledge necessary in the performance of their current or developing duties'.

The report contained two major appendices which extended the content of the Core Competencies and the areas of specific knowledge and skill requirements (Tables 4 and 5) previously expounded in the Discussion Document. These common Areas of Know-how were prefaced by requirements necessary for training specialists' roles at any level. These requirements ('practical understanding') were as follows:

(i) ensure that training activities are geared to the real needs of the organisation and its workforce;

(ii) identify and overcome obstacles to training and learning which may exist;

(iii) bring to bear on problems an appropriate specialist understanding of training and learning;

(iv) interact across the many boundaries of their roles with those of others inside and outside the organisation.'

The report outlined the contents of five Common Areas '(sufficient

understanding'): (a) The organisation and its business, (c) learning and the design of learning, (d) diagnosis and problem solving, and (e) people in organisations. They also repeated their earlier proposal that the application of their requirements would have to be based on the actual needs of individual trainers within the context of their organisation, for example, the need to take into account the previous knowledge and experience of the trainer, and underlined the danger of an approach in which theory was unrelated to relevant practice in the trainer's organisation.

The Committee also built on their earlier framework of four job elements (see page233) by defining areas of specific knowledge and skill necessary for the individual trainer to carry out specific tasks (Table 3) in each element. The areas of knowledge and skill from which training requirements are to be selected are as follows: (a) direct training element requiring training technology skills and knowledge (establish learning objectives, decide technique, evaluate performance), (b) planning and organising element (eg identify specific training needs, build and implement training plans, administration of training), (c) determining or managing element (eg handling manpower issues, integrating operational and training policies, appraisal and evaluation), and (d) a consulting and advisory element (eg use of analytical tools at a senior level, knowledge of consultancy styles, formulation of strategies). The main contribution of the first report of the Training of Trainers Committee is that it develops a series of foci which are heavily biased toward job performance within the context of the training officer's organisation and, as such, relates to the realities of the 'actual' as against the ideals of the 'ought'. It also presents a model which coordinates a whole series of disparate historical requirements associated with the training officer's job and offers a useful starting point for the initial training of training officers and the development of existing staff without being either dogmatic or inflexible. But the report essentially comprises a series of hypotheses about the job of the training officer which only systematic application and experience can evaluate.

Pettigrew and Reason (1979) made a unique contribution to the development of training in their study into the changing role of T.O.s in the chemical industry. This study examined the job of a sample of T.O.s in organisations where the major variables were

taken as culture and size. Respondents were asked to answer questions in semi-structured interviews, largely bearing on the relational aspects of their job and the activities they performed, or ought to be performing, in the context of resource availability. The study was also concerned with job satisfaction, the ways in which respondents influenced decisions in their organisation, and in factors determining 'role-person-culture' congruence.

Training jobs were sub-divided into three main categories, although it was underlined that these were not watertight and may overlap: (i) Training Manager (responsible for managing the training function and training staff), (ii) Training Officer ("a person who administers and runs training activities"), and (iii) Adviser (consultant and diagnostician to management).

The research also isolated five non-judgmental perspectives on the training role: (i) Providers, (ii) Training Managers, (iii) Change Agents, (iv) Passive Providers,and (v) Roles in Transition. Providers were mainly concerned with maintenance and development of organisational performance but not with organisational change, operating within the current culture and congruent with its expectations. The Training Manager concentrated on the supervision and performance of training staff and could be either an authority generating power and influence or a co-ordinating and possibly distant link with a centralised management structure. The Change Agent was considered to be a politically neutral, but aware, outsider who facilitated the process of organisational problem-solving and who was both client-centred and personally acceptable.

The perspective of Passive Provider covered job holders of low self-esteem who were unable, or unwilling, to either define or to influence training decisions and opportunities within their organisation and were gross misfits in the person-role-culture equation. The final perspective, Role in Transition, were T.O.s in the process of moving from the Provider role to that of Change Agent in the context of "acceptable deviancy". Their main problem was seen as that of gaining legitimacy and failure was "likely to lead to ambiguity, confusion, and overload, both for the role holder and for his clients."

Pettigrew and Reason also concentrated on an essential but largely ignored theme of role relationships in training through their concepts of 'power resources', 'legitimacy' and 'boundary management'.

('The system of exchanges and function activity or role has with its environment'). This part of the study was concerned with five main requirements: (i) how the T.O. acquires resources and disposes of outputs, (ii) the exercise of influence, (iii) how the T.O. builds relations and activates images, (iv) the protection of territorial integrity, and (v) how the T.O. co-ordinates with other roles and units of the organisation.

They considered the factors of power base ("capacity developed from relationships") and cultural identification to be central to the effective functioning of the T.O.'s job, and developed the theme of the power resources available to a T.O., which included political access, cultural identification, credibility and access to information. Pettigrew and Reason argued that successful boundary management and cultural identification ("the capacity of a person to understand, empathise and use his knowledge of the value, beliefs, patterns of behaviour, language and other symbols of a culture other than his own in order to influence that other culture") were much more important than technical competence. Providers and Passive Providers tended to be dominated by administration, analyses and training courses while Change Agents, Role in Transition, and Training Managers were more inclined to accentuate the influencing and image-building side of their jobs through activities such as counselling, organisational diagnosis and the influencing of human resource decisions.

While the main contribution of the Pettigrew and Reason research is that it provides a much-needed conceptual framework for the analysis and understanding of T.O. roles in the context of power and relationships, it has two main limitations: (i) the sample was small (n = 38) and (ii) it relates to the perceptions of T.O.s.

However, the study provides a logical basis for the development of the much-needed conceptual analysis of the relationship context of the T.O.'s job and underlines the need for a power base for the initiation and development of training in the organisation and, as such, is likely to provide a major impetus for further research activities in our attempts to isolate the factors necessary for success in the training function.

Appendix (ii)

Confidential

Questionnaire No.

TRAINING OFFICER ROLES

When completed please return to:

E.L. DONNELLY, BSM FACULTY, MIDDLESEX POLYTECHNIC, QUEENSWAY, ENFIELD, MIDDX.

Confidential

Training Officer Questionnaire

Q1 Job Title: Q2 Age:

Q3 Age when completed full-time education:

Q4 Educational background (please circle) : GCE 'O'; GCE 'A'; O.N.D.; ONC; HND; HNC; DMS; C and G: 1st degree; 2nd degree; N/A. Other (please specify):

Q5 Membership of professional organisation (please tick)

I.T.O

Member	Grad.	Assoc.

I.P.M.

Member	Assoc.	Affil.	Student

Other professional organisations (please specify)

1. _____ 2. _____ 3. _____

Q6 Last three jobs

	Title	Responsible to:	Time in job
(1)			
(2)			
(3)			

Q7 What further training have you had since leaving the T.T.O. course (TABLE OVERLEAF)

Column 1. Tick to denote post-course training.

Column 2 and 3. Was the training relevant or irrelevant (please tick one column)

Column 4. Tick to denote areas where you have a specific future training need.

	Column 1 Training	Column 2 Relevant	Column 3 Irrelevant	Column 4 Future Requirements
Assessment of training needs				
Manpower Planning				
Business Management				
O.D.				
Inter-active skills				
Problem Solving				
Career Guidance				
Counselling				
Psychological Testing				
Educational System				
Job Training Analysis				
Statistical Technicues				
Training Budgets				
Management Training				
Sales Training				
Craft, Technician Training				
Technologist Training				
Administration of training				
Report Writing				
Personal Tutoring				
Handling Conflict				
Training Board Requirements				
Interviewing				
Appraisal				
Cost-benefit Analysis				
Evaluation				
Motivation				
Learning Theory				
Instructional Objectives				
Instructor Training				
Training Aids				
Visual Aids				
Employees Legislation				
Industrial Relations				
Safety				
Planned work experience				
Guided reading				
Training Research				
Visits to other training establishments				
Project work				
I.T.C. Course				
I.P.M. Course				
Secondment				

Q8 To whom do you report? Please tick

Director level	Senior Manager	Manager	Service Manager	Training Manager	Personnel Manager	Oth

To whom does your boss report? Please denote by placing circle in appropriate box.
Does anyone report to you? If so, please specify:

Q9 Has your reporting level changed? Please tick.

(a) In the last year:

Lower level	Same	Higher

(b) In the last 3 years :

Lower level	Same	Higher

Q10 Number of employees in your organisation or unit. Please tick.

100 - 299	300 - 599	600 - 999	1000 - 1499	1500 - 1999	2000+

Q11 State (A) Industry _____

(B) Product or Service supplied _____

Q12 What is the percentage change in your gross salary compared with : (a) one year ago, (b) three years ago? (Please circle)

(a) 10% 15% 20% 25% 30% 35% 40% 45%

(b) 10% 15% 20% 25% 30% 35% 40% 45% 50% 55% 60% 65% 70%

If greater, please specify.

Q13 What categories of employee training are within your job area?

Column (1) in the last year

Column (2) in the last three years

Column (3) Examine the list of job training analyses and place a number in this column corresponding with the type of analysis used.

1 - T.W.I. 2 - Job Description 3 - Seymour - Type

4 - Task analysis 5 - Problem-centred

6 - Other (please specify)

Column (4) Do you administer and organise the training? (If 'yes' please tick)

Column (5) Do you carry out the training or actively assist in the training? (If 'yes' please tick)

Column (6) This column is sub-divided into two sections. In section 'A' place a number corresponding to the type of evaluation you used in each relevant category during the last year. In section 'B' place a number corresponding to the type of evaluation you used in each relevant category three years ago.

1- Management acceptance of training

2- Pre and post tests

3- Cost/benefit analysis

4- Formal appraisal scheme

5- Number of courses run

6- Against pre-set training objectives

7- Not evaluated

8- Other(please specify)

Column (7) What is the reaction of management to training activities in each of these categories. Please place relevant number in each box.

1- Very cooperative 2- Cooperative

3- Variable 4- Uncooperative

5- Hostile

	(1) This Year	(2) 3 Years	(3) Type of Analysis	(4) Adm.	(5) Train.	(6) Evaluate A	(6) Evaluate B	(7) Management Attitude
Directors								
Senior Managers								
Managers								
Supervisors								
Sales/Marketing								
Commercial								
Clerical								
Graduate/Prof.								
Technician								
Craft Operator								
Others								

Q14 Training officer's Roles (Please tick)

Column (1) Roles covered in last year
(2) Roles covered in last 3 years
(3) Is the role time-consuming?
(4) Is the role difficult
(5) Is the role a key area) ? List the ten most important roles in your job in this column.

ROLES	(1) 1 YEAR	(2) 3 YEARS	(3) TIME CONSUMING	(4) DIFFICULT	(5) KEY AREA
Assisting in the development of organisational change					
Applying O.D. techniques					
Assisting in Identification of training needs					
Identifying training needs					
Assisting in writing of training policy					
Writing training policy					
'Selling' training to management					
Assessing future manpower requirements					
Recruiting and selecting trainees					
Psychological testing					
Using other tests					
Measuring job performance					
Formal presentation to management					
Developing training contacts (internally)					
Developing training contacts (externally)					
Working with management					
Working with T.U's.					
Working with other service functions					
Liaising with educational organisation					
Liaising with Y.E.O.					
Membership of training committees (internally)					
Membership of training committees (externally)					

ROLES	(1) 1 YEAR	(2) 3 YEARS	(3) TIME CONSUMING	(4) DIFFICULT	(5) KEY AREAS
Travelling between sites					
Handling complaints					
Counselling					
Using inter-active techniques					
Using visual aids					
Using case studies					
Applying Programme Instruction Techniques					
Keeping up-to-date with training literature					
Liaising with training board staff					
Making grant claims					
Maximising grants					
Other areas (please specify)					

Q14 List the roles, <u>you should be performing</u> that you do not cover at present. (Give reasons).

Q15 (A) List the ways in which you measure your competence.

(B) List the ways in which your employer measures your competence.

Q16 Organisation of training (please circle)

(A) Do you work : Independently As member of training team

(B) Are you : FULL TIME PART TIME

(C) Are you responsible for administration staff : Yes No

(D) If so, are they : Full-time Part-time

Please give brief description of non-training duties (if any)

Q17 How does your organisation determine training needs?
Please tick relevant box(es).

	NOW	3 yrs ago		NOW	3 yrs ago		NOW	3 yrs ago
Derived from corporate objectives			Specific demands by managers			Legislative requirements		
By-product of appraisal scheme			Training Board requirements			Problem areas in organisation		
Board or senior management decision			Joint Manager/ T.O. decision			T.O's decision		
Based on future capital expenditure			Safety training requirements			Derived from O.D. analysis		

Other (please specify)

Q18 What training techniques do you use? Please tick.

Column 1 - Presently. Column 2 - 3 years ago.

	1 NOW	2 3 yrs ago		1 NOW	2 3 yrs ago
Case studies			Buzz groups		
Simulators			Seminars		
Role play			Training projects		
Lectures			Discussion group		
Informal instructions			Interactive techniques		

Other (please specify)

Q19 How is your training budget determined? Please tick

Structured by T.O. and agreed with management ☐

Jointly assessed with management ☐

Presented to you without prior consultation ☐

Finance supplied as required ☐

Sub-divided according to category of trainee ☐

Determined by Training Board requirements ☐

Sub-division of personnel budget ☐

Derived from training need analysis ☐

Q20 Contact with senior managers (SM) and managers (M)
Frequency of contact (Please tick)

	SM	M		SM	M		SM	M		SM	M		SM	M		SM	M
Monthly			Weekly			Daily			Irregular intervals			Seldom			No contacts		

Do you normally find these meetings:

	SM	M		SM	M		SM	M
Helpful			Little value			Frustrating		

If 'frustrating' give reasons:

Q21 What are the main snags in your job? Please list six most important in numerical order and tick others where appropriate.

Lack of management involvement		Resistance to organisational change	
Low budget		Lack of training staff	
Inability of Senior management to use training function		Writing reports	
Low status of training		Keeping up-to-date with training literature	
Too much admin/clerical work		Organising courses	
Limited career prospects		Evaluation	
Lack of physical resources		Instructing	
Completion of I.T.B. returns		Duties not defined	
Having to sell training		Low salary	
Long hours		Lack of trainee motivation	
		Handling disciplinary problems	

Other (please list)

)w could each of the first three snags be minimised or eliminated?

iag 1
iag 2
iag 3

Q22 O.D. and Training

Has your organisation applied O.D. techniques?

(Please circle) YES NO

If 'yes' please list main achievements and/or limitations in the training context.

Q23 In what areas of your organisation have you had the greatest impact? Give reasons.

Q24 The following are the T.T.O. Course objectives

Column 1 Were the objectives fulfilled or unfulfilled? Please tick.

Column 2 Are they relevant or irrelevant to your job? Please tick.

Course Objectives	Column 1		Column 2	
	Fulfilled	Unfulfilled	Relevant	Irrelevant
ecognise the importance of the acceptance actor in the trainer's job				
tate the characteristics of systematic raining				
istinguish the types of training functions n organisations				
dentify motivational needs and relate those eeds to differing styles of organisational tructure				
arry out an assessment of training needs and rite an assessment report				
ndertake a training analysis				
tructure, job description and specification				
dentify training needs of individuals				
repare a training programme				
tructure a recording procedure				
tate the main characteristics of nstructional techniques				
elect appropriate visual aids for nstructional sessions				
stablish validation and evaluation criteria, ith particular reference to the problems f applying cost-benefit criteria				
arry out assessment interviews of staff with view to their more effective deployment nd development.				

Q25 Training Boards (where relevant)

How would you describe the relationship between (a) you and Board Staff, (b) Management and Board Staff? Please tick

	Cooperative	Apathetic	Hostile
T.O.			
Man			

Please list main changes, if any, in your relationship with the I.T.B. during the last 3 years.

To what extent is your organisation 'grant maximisation' orientated. Please circle.

VERY MARGINALLY NOT

Q26 Future career. What post do you expect to fill in 3 years time?

Q27 Are there any further points you wish to make about your job as T.O. which have not been covered in the questionnaire?

P.T.O.

Thank you for your cooperation.

JOB QUESTIONNAIRE

Management & Training No _____

	Strongly agree	Agree	Uncertain	Disagree	Strongly disagree
Training is essentially about 'improved' job performance					
Running courses is not a major function of the T.O.					
Training can only be successful if it has the active participation of managers					
I find training meetings helpful					
Senior management should write the training policy					
There is an effective working relationship between the training function and the production/service function(s)					
During periods of economy training budgets are more vulnerable than other budgets					
The evaluation of training, although often difficult, is essential for ensuring the correct utilisation of training resources.					
Managers are still responsible for the training of their subordinates					
Our organisation would be less effective without a T.O.					
Most organisational changes generate a demand for training therefore the T.O. should be involved in organisational change					
Training Boards make a positive contribution to our training requirements					

Please return the completed questionnaire to:-

E.L. Donnelly,
Middlesex Polytechnic,
Queensway,
Enfield,
Middlesex.

d you please detach the duplicate copy of this part of the questionnaire and ask the senior line manager you work with to complete it and send it to me.

QUESTIONNAIRE

Management & Training

No _____

	Strongly agree	Agree	Uncertain	Disagree	Strongly disagr
A. Training is essentially about 'improved' job performance					
B. Running courses is not a major function of the T.O.					
C. Training can only be successful if it has the active participation of managers					
D. I find training meetings helpful					
E. Senior management should write the training policy					
F. There is an effective working relationship between the training function and the production/service function(s)					
G. During periods of economy training budgets are more vulnerable than other budgets					
H. The evaluation of training, although often difficult, is essential for ensuring the correct utilisation of training resources.					
I. Managers are still responsible for the training of their subordinates					
J. Our organisation would be less effective without a T.O.					
K. Most organisational changes generate a demand for training therefore the T.O. should be involved in organisational change					
L. Training Boards make a positive contribution to our training requirements					

Please return the completed questionnaire to:-

E.L. Donnelly,
Middlesex Polytechnic,
Queensway,
Enfield,
Middlesex.

ould you please detach the duplicate copy of this part of the questionnaire and ask the ost senior line manager you work with to complete it and send it to me.

Appendix (iii)

Middlesex Polytechnic

Queensway
Enfield
Middlesex EN3 4SF
Telephone 01-804 8131

Your reference | Our reference | Date

Dear

In case the original has gone astray I enclose a further copy of the questionnaire and my letter with a stamp-addressed envelope.

The questionnaire may look formidable but it is in the main a matter of ticking squares and takes about thirty minutes to complete.

I shall be most grateful for your help as only ex-course members are in a position to supply this information which will benefit many future training officers.

I will be circulating all respondents with a resumé of research finding related to the current problems of Training Officers.

Please do not hesitate to contact me if you require any further information.

With best wishes.

Yours sincerely,

Eugene Donnelly.

Enc.

Middlesex Polytechnic

Queensway
Enfield
Middlesex
EN3 4SF
Telephone 01-804 8131

Your reference | Our reference | Date

Dear

I am doing a piece of private research into the work roles and problem areas of post Training of Training Officer Course members and I would be grateful for your participation in this project.

The purpose of the research is to get your view of the training officers job and so up-date our knowledge of what T.O's actually do in their organisations, the type of problems they face, how their jobs are changing and how they can be assisted in their work.

If you have any difficulty in completing any part of the questionnaire please do not hesitate to contact me. All replies will be completely confidential and no persons or organisations will be identified in the final report.

I look forward to your cooperation.

With best wishes.

Yours sincerely,

Eugene Donnelly

APPENDIX (iv)

TABLES

35. Key Areas (Sizes: 100- 299)
36. " " (" 300- 599)
37. " " (" 600- 999)
38. " " (" 1000-1499)
39. " " (" 1500-1999)
40. " " (" 2000+)
41. Comparison of Rankings: Key Areas, Ranked Roles, Difficult Roles, Time-consuming Roles
42. Engineering Respondents: Top 20 Roles
43. A List of the Roles which T.O.s state they are not Performing
44. T.O.s Areas of Greatest Impact
45. Career Aspirations in 3 Years' Time: Analysed by Age
46. Categories of Trainees: Changes over 3-year Period
47. Types of Training Analysis Used (All Firms)
48. " " " " " (Sizes: 100- 299)
49. " " " " " (" 300- 599)
50. " " " " " (" 600- 999)
51. " " " " " (" 1000-1499)
52. " " " " " (" 1500-1999)
53. " " " " " (" 2000+)
54. Administration and Training Categories
55. Types of Evaluation Used by T.O.s
56. Factors Used to Determine Training Needs
57. Training Techniques Used
58. Budget Determinants
59. Relationships with Training Board Staff
60. Organisations Using OD
61. Fulfilment and Relevance of TTO Course Objectives
62. Post TTO (Introductory) Course Training: Top 20 Subjects

TABLE 1

EITB JOB DESCRIPTION ITEMS

(Reproduced with the permission of the Engineering Industry Training Board)

Job Description Item[1]	Percentage		
	Full-time Training Officers	Part-time Training Officers	All Training Officers
Advising on establishments and using procedures and techniques for the induction, appraisal and development of employees	84	83	83
Organising the training and development of particular categories of staff throughout an organisation, and securing the co-operation of all concerned	87	77	83
Designing and preparing programmes of training and development, based on requisite job, tasks and/or skills analysis, performance assessment or appraisal, specified training objectives, and appropriate learning methods and aids, available internal and/or external resources	91	65	80
Identifying and assessing long and short term training needs at organisational, job and individual levels	78	68	74
Establishing training priorities, developing appropriate strategies and plans, and securing the resources necessary to meet these	79	62	72
Understanding the constraints and opportunities presented by the national education and training environment, and using available external sources such as those arising from the education system, government policies, the Industrial Training Act, professional and other organisations	71	64	66
Identifying the purpose and place of training and development in an organisation	68	60	65
Recommending, establishing and using appropriate procedures and techniques for recruitment, selection, promotion, transfer and termination of employment of staff	54	71	61
Analysing, describing and specifying job, preparing personnel specifications	52	71	60
Developing methods of validating and evaluating training and development activities within the organisation	67	43	57
Preparing and working within agreed training budgets	63	46	56
Identifying and assessing the organisation's present and future manpower requirements	31	60	43
Making and/or using forecasts of likely manpower supply and demand and preparing budgets	28	46	36
Assessing the cost-effectiveness of manpower planning, recruitment and selection services	14	39	24

[1] Training for Management of Human Resources. HMSO. 1972.

TABLE 2

ASTD TOP 25 JOB ITEMS

(Reproduced with permission from "A Study of Professional Training and Development Roles and Competencies by Patrick R. Pinto, PhD and James W. Walker, PhD. Copyright 1978 by the American Society for Training and Development.)

Frequencies for the Top 25 Items

Total Sample N = 2790				Practitioner's Sample N = 2071
Item Number	Content	Median	Rank	Rank
18	Design specific programs to satisfy needs (eg, management development, supervisory training, technical development).	3.800	1	1
54	Establish and maintain good working relationships with managers as clients.	3.681	2	3
19	Determine program content (topics).	3.577	3	2
38	Conduct training programs/ activities.	3.427	4	4
55	Explain recommendations to gain acceptance for them.	3.402	5	7
20	Apply concepts of human development and growth in designing training and development programs.	3.395	6	6
21	Apply adult learning theory/ instructional principles in developing program content and materials.	3.395	7	5
43	Technique: discussions (cases issues, etc.)	3.318	8	8
89	Counsel with employees and supervisors on training and development.	3.265	9	9
96	Keep abreast of training and development concepts, theory, techniques and approaches.	3.242	10	12

TABLE 2 (continued)

Item Number	Content	Median	Rank	Practitioner's Sample N = 2071 Rank
17	Establish objectives for programs (eg, behavioural or learning objectives).	3.201	11	11
39	Decide whether to use an existing program, purchase an external program or create a new one to satisfy needs.	3.164	12	10
28	Determine program structure (length, number of participants, choice of techniques, seating configurations).	3.120	13	13
48	Evaluate training and development needs to set program priorities.	3.031	14	15
22	Evaluate alternative instructional methods (eg, videotape, role-play demonstration).	2.996	15	14
45	Identify training and development needs through interviews or informal discussions.	2.925	16	18
62	Prepare budgets (plans) for training and development program and projects.	2.856	17	17
41	Revise materials/programs based on evaluation feedback.	2.852	18	16
91	Keep abreast of training and development activities in other organisations (eg, competitors, other local firms).	2.823	19	21
23	Develop training materials (eg, workbooks, exercises, cases).	2.805	20	19
42	Analyze performance problems to determine any applicable training and development solutions.	2.767	21	22
61	Make formal management presentation plans for training and development programs and projects.	2.752	22	20
43	Technique: lecture with or without media.	2.726	23	26
104	Write memos or announcements.	2.726	24	23
59	Project future training needs (relating to management succession, organisation change, etc.).	2.681	25	24

TABLE 3

ASTD BOTTOM 25 JOB ITEMS

Frequencies for the Bottom 25 Items

Total Sample N = 2790				Practitioner's Sample N = 2071
Item Number	Content	Median	Rank	Rank
31	Design community development programs.	.170	1	1
85	Hire professionals to record cassettes.	.219	2	2
26	Develop programmed learning or computer-managed instructional materials.	.389	3	4
43	Technique: internships/ assistantships.	.403	4	3
73	Administer tuition reimbursement program.	.408	5	5
86	Prepare artwork and copy for slides.	.412	6	7
74	Secure necessary copyright or reprint permissions.	.416	7	10
43	Technique: job rotation.	.438	8	7
43	Technique: laboratory education/ sensitivity training.	.449	9	5
105	Administer achievement tests/ aptitude tests/questionnaires.	.455	10	8
70	Design data collection procedures to maintain privacy or confidentiality.	.622	11	11
98	Interpret statistics and data (eg, scatter plots, time series).	.961	12	13
103	Write articles (for periodicals, internal publications).	.971	13	12
94	Keep abreast of OSHA regulations and related training and development practices.	.990	14	14

TABLE 3 (continued)

Item Number	Content	Median	Rank	Rank
92	Communicate with government personnel on training and development matters (eg, meetings, conversations, correspondence).	1.000	15	15
99	Present statistics and data (eg, charts, tables).	1.133	16	17
69	Design or use information system for data on programs, projects, participants, instructors, materials, etc.	1.163	17	20
30	Develop program or courses in collaboration with colleges, universities, or other institutions.	1.165	18	16
24	Prepare scripts (for films, video-tapes, etc.)	1.186	19	21
25	Write cases based on personal experiences or observation (research).	1.186	20	18
102	Write speeches relating to training and development.	1.251	21	19
49	Identify training implications prior to implementing other personnel programs (benefit programs, recruiter training, labour relations, etc.)	1.302	22	22
43	Technique: simulation/ advanced gaming.	1.360	23	23
87	Operate audio-visual equipment.	1.404	24	25
43	Technique: programmed instruction/self instruction.	1.522	25	

TABLE 4

(Reproduced with the permission of the Manpower Services Commission)

COMMON AREAS OF KNOW-HOW (MSC)

1. Some practical understanding of each of these areas is needed by all persons in training specialist roles at any level. It is necessary so that such staff may be able more effectively to:

   (i) ensure that training activities are geared to the real needs and circumstances of the organisation and its work force;

   (ii) identify and overcome obstacles to training and learning which may exist;

   (iii) bring to bear on problems an appropriate specialist understanding of training and learning;

   (iv) interact across the many boundaries of their roles with those of others inside and outside the organisation.

2. The Common Areas are:

   (i) The organisation and its business

   Training staff should have a sufficient understanding for their job needs of:

   (a) the structure, objectives and policies;

   (b) the products or services;

   (c) the business environment and practices;

   (d) the technology and work processes;

   (e) the relationships, needs and problems of their own organisations;

   (f) the ways organisations work and develop.

   (ii) The training function and training specialist roles

   They should have a sufficient understanding of:

   (a) how training is and may be organised effectively in the organisation;

   (b) trainer roles, what influences these in practice in their organisation, and how these may be appropriately extended and developed;

   (c) relationships with education and training resources inside and outside the organisation and how these may be used.

   (iii) Learning and the design of learning

   They should have a sufficient understanding of:

   (a) how, where, when and why they and others learn;

   (b) the various ways in which people can be helped to learn in practice, eg, off or on-the-job, by specific training activities, or by self-development through work and experience;

(c) different approaches to designing, implementing and evaluating learning and learning systems.

(iv) Diagnosis and problem solving

They should have a sufficient understanding of:

(a) appropriate systems and methods of diagnosing situations;

(b) how problems and opportunities present themselves;

(c) how learning needs and priorities may be identified;

(d) what is involved by way of judgement, strategy and tactics in arriving at practicable solutions and getting them implemented.

(v) People in organisations

They should have a sufficient understanding :

(a) their own and others needs and behaviour as individuals and groups and how this affects learning and the day-to-day relationships of the trainer;

(b) ways of handling these relationships in practice;

(c) relevant skills of advocacy, selling, communication, advising, coaching, etc.

3. In applying the common know-how areas to specific core-competency programmes a number of considerations apply. They illustrate the fact that programmes will need to vary in their coverage, flexibility and depth of treatment. The main considerations are:

(i) some of the know-hows, particularly those to do with the organisation and its business, may well be expected as a prior requirement in selecting training staff;

(ii) the wide variety of abilities and experience that people already bring with them to the training function means that on any one programme there will be differences in the extent to which adequate know-hows are already possessed;

(iii) some know-hows may best be acquired through individual induction or up-dating rather than through attending a course;

(iv) too academic a treatment would be out of place in core-competency training and care will have to be taken to ensure that theory is related and applied to practice;

(v) the common areas of know-how do not stand on their own - they are closely related to the application of practitioner skills and knowledge and may often best be learned in this setting.

TABLE 5

(Reproduced with the permission of the Manpower Services Commission)

AREAS OF SPECIFIC KNOWLEDGE AND SKILLS (MSC)

4. In addition to common know-hows training staff will require the knowledge and skills to carry out the specific tasks involved in their individual jobs. Because there is so much variety in practice we have identified four 'role elements' which in one combination or another are present in training manager, training adviser or training officer types of posts. These elements can be used as a framework for establishing what key abilities are needed in any one case.

5. The four areas are:

(i) A direct training element

In this element the training specialist is involved in preparing for and carrying out direct tuition. He or she needs training technology skills and knowledge, including appropriate techniques, in order to do one or more of the following:

(a) establish learning objectives;

(b) define who the training is for and analyse specific learning needs, attitudes and characteristics;

(c) assess practical constraints of time, cost, facilities, etc. and overcome or plan training within these;

(d) assess the readiness and capabilities of trainees, trainers or the organisation to make use of particular styles of training;

(e) decide on and use methods and techniques which are appropriate;

(f) decide on and use appropriate training equipment and aids;

(g) prepare or obtain training material;

(h) design training programmes as a whole or detailed elements of them;

(i) pilot and validate programmes;

(j) prepare and carry out training sessions for individuals and groups to meet learning objectives;

(k) directly manage training programmes of a variety of kinds including the 'nuts and bolts' of day-to-day organisation, motivation and control;

(l) assess performance and evaluate the results of a training programme;

(m) assist transfer to practice;

(n) supervise, train, guide and assess instructors or tutors.

(ii) A planning and organising element

In this element training specialists carry out tasks to provide a framework for the training activities of an organisation. They need skills, knowledge and techniques to do one or more of the following:

(a) identify, analyse or respond to specific training needs;

(b) take account of business, technical, industrial relations and other developments;

(c) carry out job or skills analysis;

(d) build up or advise on training plans, discuss and negotiate these with other parties and arrive at a commitment by those concerned;

(e) implement, maintain and review training plans and activities;

(f) effectively administer their part of the training function and its internal and external relationships;

(g) administer training facilities and staff;

(h) negotiate and work within training budgets;

(i) identify and plan the use of inside and outside resources for education and training or act as a source of information about such resources;

(j) prepare papers and reports;

(k) identify, develop and obtain essential training facilities and equipment;

(l) recruit and select craft, technician, graduate, etc. trainees.

(iii) A determining or managing element

This element is characterised by the exercise of effective structural power at a policy-influencing level. It is not likely to form a great part of the roles of training staff in larger organisations on first entering the training function, but could well do so in smaller organisations. It would normally involve an organisation or division-wide control of training activities, and close contact with operational and manpower issues and developments. Training staff carrying out tasks in this area need skills and knowledge as appropriate to:

(a) exercise senior management responsibilities, including the management of other training specialists;

(b) deal with ideas, attitudes, strategy, tactics, people, etc. at a requisite level;

(c) identify the wide variety of training needed for a total organisation or function and to devise a total training strategy and establish priorities;

(d) put training in a business and manpower setting;

(e) appraise business, functional, manpower and industrial relations problems as well as training ones and to integrate operational and training policies;

(f) determine and implement appropriate ways of organising training and allocating training responsibilities throughout the organisation;

(g) gain management commitment to and support of training throughout the organisation;

(h) negotiate for and control financial and other resources;

(i) envisage and plan for future needs and assist with implementing new policies;

(j) play a key role in management development and appraisal;

(k) ensure that training effectiveness is evaluated and training expenditure is justified;

(l) be aware of research and developments in the training field and apply them as relevant.

(iv) A consulting and advisory element

This element is increasingly present in all training specialist roles as well as forming a major part of the roles of many at a senior level and of those, like Training Board staff, who operate from outside the organisation. In it the training specialist provides an advisory and/or consultancy service to managers and others at any level. He or she achieves results through expertise and ability rather than through formal authority. The extent of competencies required will vary considerably with the level and scope of the job. Training staff whose roles include tasks within this area need skills and knowledge as appropriate to enable them to:

(a) work informally in and around the organisation and be sensitive to situations and to people;

(b) establish and maintain a wide range of relationships;

(c) plan for learning to take place in and through jobs as well as through more formal training;

(d) interview, listen, coach, counsel and persuade;

(e) adapt to a range of situations, people and thinking processes;

(f) use a range of tools of analysis in diagnosing problems, situations and obstacles to learning and action, including research and survey methods;

(g) appreciate a range of values and consultant styles, including his or her own;

(h) give informal and relevant information and advice;

(i) formulate, communiate and test views, options and strategies.

TABLE 6

STANDARD INDUSTRIAL CLASSIFICATION BY FIRM SIZE (%) (n = 58)

Industry	Firm Size*						
	1	2	3	4	5	6	Total
Mining and Quarrying						2	2
Food, Drink and Tobacco	2			5	3	5	15
Chemicals and Allied Industries	2	3					5
Engineering	3	5	9	2	2	2	23
Clothing and Footwear			2	2			4
Bricks, Pottery, Glass, etc.				2			2
Timber, Furniture, etc.				2			2
Paper, Printing and Publishing	5	3		3	2		13
Gas, Electricity and Water		2		2		2	6
Transport and Communication	2		2				4
Distributive Trades		2		2	2	3	9
Administrative, Finance and Professional Services			4		2	4	10
Miscellaneous Services				2		3	5
Total	14	15	21	18	11	21	100

*Firm Size: 1) 100-239 3) 600- 999 5) 1500-1999
2) 300-599 4) 1000-1499 5) 2000+

TABLE 7

AGE RANGE OF SAMPLE (n = 58)

Age range	%
23 - 29	12
30 - 39	26
40 - 49	38
50 - 59	19
60 - 62	5

TABLE 8

EDUCATIONAL BACKGROUND AND AGE WHEN COMPLETED FULL-TIME EDUCATION (n = 55)

Age	%
14 - 16	38.2
17 - 18	38.2
19 - 20	3.4
21 - 23	20

TABLE 9

EDUCATIONAL QUALIFICATIONS (n = 58)

Qualification	%
None	27.8
O level GCE	31
A " "	12
OND	1.7
HNC	8.6
DMS	3.4
C&G	3.4
1st Degree	6.9
2nd Degree	5.2

TABLE 10

RELATIONSHIP BETWEEN ACADEMIC QUALIFICATIONS AND LEVEL OF TRAINING RESPONSIBILITY

(n = 58)

Trainee Category	Degree-level respondents responsible for category	Degree-level respondents not responsible for category	Non-degree level respondents responsible for category
Director	2	9	5
Senior Manager	7	4	23
Manager	7	4	33
Supervisor	7	4	37
Sales/Marketing	3	8	13
Commercial	4	7	17
Clerical	5	6	30
Graduate/Professional	5	6	13
Technician	6	5	23
Craft/Operative	5	6	25

TABLE 11

JOB TITLES

The number in brackets denotes frequency of title.

Area Training Adviser
Assistant Training Manager (2)
Association Training Officer
Chief Training Officer
Company Training Officer
Education and Training Manager
Fleet Personnel Officer (Recruitment and Training)
Group Training Manager
Group Training Officer
Industrial Relations Officer
Operations Training Engineer (2)
Personnel Manager (2)
Personnel Officer (2)
Personnel, Safety, Training Officer (2)
Personnel and Training Manager (3)
Personnel and Training Officer (4)
Plant Training Officer
Reception Operations Manager
Recruitment Officer
Recruitment and Training Officer
Retail Sales Training Officer
Senior Technical Training Coordinator
Training Administration Manager
Training and Assistant Personnel Officer
Training Consultant
Training and Development Manager (2)
Training Engineer
Training Manager (7)
Training Officer (11)
Training and Safety Officer (3)

(30 titles)

TABLE 12

FULL AND PART-TIME T.O.s AND THEIR ADMINISTRATIVE STAFF % (n = 55)

Size of Firm	1	2	3	4	5	6	7	8
100- 299	10	2	9	4	7	5	5	4
300- 599	12	6	7	10	9	9	5	4
600- 999	18	2	15	6	16	4	7	7
1000-1499	15	4	16	2	9	9	9	0
1500-1999	2	5	7	0	7	0	7	0
2000+	15	9	24	0	16	7	15	2
TOTAL	72	28	78	22	64	34	48	17

Key:
1. Independent
2. Member of team
3. Full-time
4. Part-time
5. Administrative Staff
6. None
7. Full-time staff
8. Part-time staff

TABLE 13

FREQUENCY OF CONTACTS WITH SENIOR MANAGERS (SM) AND MANAGERS (M) %

(n = 58)

	SM	M		SM	M		SM	M		SM	M		SM	M		SM
Monthly	7	3	Weekly	26	17	Daily	40	67	Irregular Intervals	19	9	Seldom	8	3	No Contacts	

TABLE 13a

VALUE OF MEETINGS WITH SENIOR MANAGERS (SM) AND MANAGERS (M) %

(n = 58)

	SM	M		SM	M		SM	M
Helpful	79	86	Little value	9	8.8	Frustrating	12	5.2

TABLE 14

T.O.'s PERCEPTIONS OF ATTITUDES OF MANAGERS TO CATEGORIES OF TRAINING

Categories	1	2	3	4	5	6
Directors	12	5	12			71
Senior Managers	16	17	26			41
Managers	12	26	34			28
Supervisors	22	31	28			19
Sales/Marketing	9	22	10		2	57
Commercial	9	28	12			51
Clerical	10	31	22	2		35
Graduate/Prof.	14	21	10			55
Technician	14	26	17			43
Craft/Operator	19	24	17	38		2

Key: 1. Very cooperative 3. Variable 5. Hostile
2. Cooperative 4. Uncooperative 6. No response

TABLE 15

ATTITUDES AND EXPECTATIONS OF T.O.s (n = 51)

%

	Strongly agree	Agree	Uncertain	Disagree	Strongly disagree
A. Training is essentially about 'improved job performance	55	39	4	2	-
B. Running courses is not a major function of the T.O.	8	51	8	25	8
C. Training can only be successful if it has the active participation of managers	67	27	4	2	-
D. I find training meetings helpful	4	52	33	9	2
F. There is an effective working relationship between the training function and the production/service function(s)	25	48	17	8	2
G. During periods of economy training budgets are more vulnerable than other budgets	25	52	10	13	-
H. The evaluation of training, although often difficult, is essential for ensuring the correct utilisation of training resources	27	58	11	4	-
I. Managers are still responsible for the training of their subordinates	67	31	2	-	-
J. Our organisation would be less effective without a T.O.	33	46	15	6	-
K. Most organisational changes generate a demand for training therefore the T.O. should be involved in organisational change	40	42	16	2	-
L. Training Boards make a positive contribution to our training requirements	13	23	32	30	-

TABLE 16

ATTITUDES AND EXPECTATIONS OF MANAGERS

(n = 31)

(%)

	Strongly agree	Agree	Uncertain	Disagree	Strongl disagre
A. Training is essentially about 'improved' job performance	47	53	-	-	-
B. Running courses is not a major function of the T.O.	13	37	20	17	13
C. Training can only be successful if it has the active participation of managers	58	42	-	-	-
D. I find training meetings helpful	13	55	29	3	-
E. Senior management should write the training policy	29	36	10	19	6
F. There is an effective working relationship between the training function and the production/service function(s)	29	58	6	7	-
G. During periods of economy training budgets are more vulnerable than other budgets	20	43	17	20	-
H. The evaluation of training, although often difficult, is essential for ensuring the correct utilisation of training resources	42	52	6	-	-
I. Managers are still responsible for the training of their subordinates	55	39	6	-	-
J. Our organisation would be less effective without a T.O.	42	52	6	-	-
K. Most organisational changes generate a demand for training, therefore, the T.O. should be involved in organisational change	16	58	16	7	3
L. Training Boards make a positive Contribution to our training requirements	6	42	23	26	3

TABLE 17

ROLES COVERED IN THE LAST YEAR: TOP 20 (ALL FIRMS)

(n = 58)

%	
83	Working with management
78	Administration of training
76	Telephoning
74	Developing training contacts (external)
72	Selling training to management
72	Preparing training programmes
71	Identifying training needs
69	Developing training contacts (internal)
67	Administering courses (internal)
65	Assisting in the identification of training needs
64	Keeping up-to-date with training literature
64	Liaising with educational organisation
62	Liaising with training board staff
59	Using visual aids
57	Recruiting and selecting trainees
57	Assisting in the development of organisational change
53	Formal lecturing
53	Writing training reports
53	Counselling
53	Instructing

BOTTOM 10

29	Liaising with Y.E.O.
28	Handling complaints
28	Placing trainees
28	Maximising grants
24	Getting training staff
24	Using interactive techniques
17	Applying PI techniques
14	Applying OD techniques
10	Psychological testing
7	Using simulators

TABLE 18

ROLES COVERED IN THE LAST YEAR: TOP 20 (SIZE: 100-299)

(n = 8)

%	
100	Telephoning
87	Liaising with training board staff
87	Administration of training
87	Identifying training needs
87	Developing training contacts (externally)
87	Using training budgets
87	Recruiting and selecting trainees
87	Structuring training budgets
87	Working with management
87	Liaising with educational organisation
75	Costing training
75	Writing training objectives
75	Structuring training records
75	Keeping up-to-date with training literature
75	Administering training courses (internal)
75	Assisting in the identification of training needs
75	Working with other service functions
75	Assessing performance of trainees
75	Assessing future manpower requirements
62	Preparing training programmes

BOTTOM 10

25	Membership of training committees (internally)
25	Using visual aids
13	Training instructors
13	Maximising grants
0	Recruiting and selecting instructors
0	Using simulators
0	Applying OD techniques
0	Getting training staff
0	Supervising training staff
0	Psychological testing

TABLE 19

ROLES COVERED IN THE LAST YEAR: TOP 20 (SIZE: 300-599)

(n = 9)

%	
77	Administration of training
77	Recruiting and selecting trainees
77	Assessing future manpower requirements
77	Liaising with educational organisation
77	Working with management
77	Developing training contacts (externally)
66	Assisting in the identification of training needs
66	Structuring training records
66	Developing training contacts (internally)
66	Preparing training programmes
66	Telephoning
66	Selling training to management
55	Liaising with training board staff
55	Using other tests
55	Identifying training needs
55	Working with TUs
55	Working with other service functions
44	Writing training policy
44	Keeping up-to-date with training literature
44	Handling disciplinary problems

BOTTOM 10

22	Measuring job performance
22	Job training analyses
11	Getting training staff
11	Training instructors
11	Supervising trainees
11	Membership of training committees (internally)
11	Placing trainees
11	Maximising grants
0	Applying OD techniques
0	Using interactive techniques

TABLE 20

ROLES COVERED IN THE LAST YEAR: TOP 20 (SIZE: 600-999)

(n = 9)

%	
100	Administering courses (internal)
100	Preparing training programmes
100	Working with management
100	Identifying training needs
90	Telephoning
90	Administration of training
90	Developing training contacts (internally)
90	" " " (externally)
81	Liaising with educational organisation
81	Keeping up-to-date with training literature
81	Selling training to management
72	Liaising with training board staff
72	Formal lecturing
72	Assisting in the identification of training needs
72	Handling disciplinary problems
72	Using visual aids
72	Counselling
72	Recruiting and selecting trainees
72	Writing training reports
72	Getting training equipment

BOTTOM 10

36	Applying OD techniques
36	Using other tests
36	Getting training staff
27	Membership of training committee (externally)
27	Applying PI techniques
27	Writing progress reports on trainees
27	Psychological testing
27	Membership of training committees (internally)
0	Using simulators
0	Using case studies

TABLE 21

ROLES COVERED IN THE LAST YEAR: TOP 20 (SIZE: 1000-1499)

(n = 10)

%	
90	Identifying training needs
90	Working with management
80	Administering courses (internal)
80	Developing training contacts (internal)
80	Administration of training
70	Selling training to management
70	Liaising with training board staff
70	Assisting in the development of organisational change
70	Training instructors
70	Preparing training programmes
70	Telephoning
70	Making grant claims
70	Keeping up-to-date with training literature
70	Developing training contacts (externally)
60	Travelling between sites
60	Membership of training committee (internally)
60	Liaising with educational organisation
50	Instructing
50	Formal presentation to management
50	Administering courses (external)

BOTTOM 10

20	Placing trainees
20	Working with TUs
10	Applying PI techniques
10	Using interactive techniques
10	Liaising with Y.E.O.
10	Using simulators
10	Getting training accommodation
10	Applying OD techniques
0	Handling complaints
0	Psychological testing

TABLE 22

ROLES COVERED IN THE LAST YEAR: TOP 20 (SIZE: 1500-1999)

(n = 6)

%	
83	Getting training accommodation
83	Administering courses (internal)
83	Administration of training
83	Writing of training objectives
83	Selling training to management
83	Keeping up-to-date with training literature
83	Telephoning
83	Using visual aids
83	Counselling
83	Preparing training programmes
83	Formal presentation to management
83	Developing training contacts (internally)
83	" " " (externally)
83	Working with management
83	Working with TUs
83	Getting training equipment
66	Liaising with educational organisation
66	Identifying training needs
66	Writing training reports

BOTTOM 10

33	Placing trainees
33	Using interactive techniques
33	Maximising grants
16	Liaising with Y.E.O.
16	Applying PI techniques
16	Assessing future manpower requirements
16	Writing training policy
16	Supervising trainees
0	Using simulators
0	Psychological testing

TABLE 23

ROLES COVERED IN THE LAST YEAR: TOP 20 (SIZE: 2000+)

(n = 14)

%	
78	Selling training to management
63	Working with management
63	Assisting in the identification of training needs
56	" " " development of organisational change
56	Writing training reports
56	Using visual aids
56	Administration of training
56	Developing training contacts (internally)
56	Telephoning
56	Evaluating training
56	Instructing
56	Travelling between sites
56	Preparing training programmes
50	Structuring training budgets
50	Developing training contacts (externally)
50	Administering courses (internal)
50	Formal lecturing
42	Using training budgets
42	Writing training policy
42	Getting training equipment

BOTTOM 10

21	Liaising with Y.E.O.
21	Administering courses (externally)
14	Working with TUs
14	Handling complaints
14	Training instructors
7	Applying OD techniques
7	Using simulators
7	Job training analyses
7	Psychological testing
7	Applying PI techniques

TABLE 24

ROLES COVERED IN THE LAST 3 YEARS: TOP 20 (ALL FIRMS)

(n = 58)

%	
71	Working with management
69	Administration of training
66	Telephoning
64	Selling training to management
62	Assisting in the identification of training needs
60	Developing training contacts (externally)
60	Recruiting and selecting trainees
59	Developing training contacts (internally)
59	Preparing training programmes
59	Administering courses (internal)
59	Keeping up-to-date with training literature
59	Liaising with educational organisation
57	Identifying training needs
57	Using visual aids
57	Liaising with training board staff
50	Writing training objectives
48	Instructing
47	Structuring training records
47	Getting training equipment
43	Making grant claims

BOTTOM 10

26	Job Training analyses
25	Training instructors
25	Membership of training committees (externally)
22	Getting training staff
19	Using interactive techniques
17	Placing trainees
16	Applying PI techniques
10	Applying OD techniques
9	Psychological testing
2	Using simulators

TABLE 25

ROLES COVERED IN THE LAST 3 YEARS: TOP 20 (SIZE: 100-299)

(n = 8)

%	
87	Recruiting and selecting trainees
87	Identifying training needs
75	Structuring training records
75	Liaising with training board staff
75	Working with management
75	Telephoning
75	Assessing performance of trainees
62	Administering courses (internal)
62	Developing training contacts (externally)
62	Liaising with educational organisation
62	Administration of training
62	Writing training objectives
50	Liaising with Y.E.O.
50	Keeping up-to-date with training literature
50	Supervising trainees
50	Assisting in the identification of training needs
50	Working with other service functions
50	Administering courses (external)
50	Working with TUs
50	Preparing training programmes

BOTTOM 10

13	Formal presentation to management
13	Getting training accommodation
13	Training instructors
12	Applying PI techniques
0	Recruiting and selecting instructors
0	Using simulators
0	Applying OD techniques
0	Getting training staff
0	Supervising training staff
0	Psychological testing

TABLE 26

ROLES COVERED IN THE LAST 3 YEARS: TOP 20 (SIZE: 300-599)

(n = 9)

%	
66	Administration of training
66	Liaising with training board staff
66	Liaising with educational organisation
55	Selling training to management
55	Assisting in the identification of training needs
55	Developing training contacts (externally)
55	Telephoning
55	Handling complaints
55	Recruiting and selecting trainees
44	Developing training contacts (internally)
44	Working with management
44	Structuring training budgets
44	Preparing training programmes
44	Using other tests
44	Structuring training records
44	Making grant claims
44	Supervising training staff
34	Getting training accommodation
34	Increasing training budget
33	Keeping up-to-date with training literature

BOTTOM 10

11	Maximising grants
11	Measuring job performance
11	Psychological testing
11	Training instructors
11	Supervising trainees
0	Membership of training committees (internally)
0	Placing trainees
0	Using simulators
0	Applying OD techniques
0	Using interactive techniques

TABLE 27

ROLES COVERED IN THE LAST 3 YEARS: TOP 20 (SIZE: 600-999)

(n = 9)

%	
81	Liaising with educational organisation
81	Preparing training programmes
81	Working with management
72	Identifying training needs
72	Assisting in the identification of training needs
72	Administration of training
72	Developing training contacts (internally)
72	" " " (externally)
72	Recruiting and selecting trainees
72	Assisting in writing of training policy
63	Telephoning
63	Recruiting and selecting instructors
63	Keeping up-to-date with training literature
63	Administering courses (internal)
63	Structuring training records
63	Selling training to management
54	Liaising with training board staff
54	Using visual aids
54	Training instructors
54	Assisting in the development of organisational change

BOTTOM 10

27	Applying OD techniques
27	Travelling between sites
27	Membership of training committees (internally)
27	Using training budgets
27	Applying PI techniques
18	Placing trainees
18	Psychological testing
18	Using interactive techniques
9	Using case studies
0	Using simulators

TABLE 28

ROLES COVERED IN THE LAST 3 YEARS: TOP 20 (SIZE: 1000-1499)

(n = 10)

%	
90	Developing training contacts (internally)
90	Working with management
90	Administering courses (internally)
80	Identifying training needs
80	Administration of training
80	Telephoning
80	Liaising with training board staff
80	Keeping up-to-date with training literature
70	Travelling between sites
70	Preparing training programmes
70	Selling training to management
70	Making grant claims
70	Assisting in identification of training needs
70	Using visual aids
70	Preparing training manuals
60	Structuring training records
60	Instructing
60	Developing training contacts (externally)
60	Formal lecturing
50	Membership of training committees (internally)

BOTTOM 10

20	Applying OD techniques
20	Working with TUs
20	Applying PI techniques
10	Using other tests
10	Membership of training committees (externally)
10	Using interactive techniques
0	Liaising with Y.E.O.
0	Using simulators
0	Handling complaints
0	Psychological testing

TABLE 29

ROLES COVERED IN THE LAST 3 YEARS: TOP 20 (SIZE: 1500-1999)

(n = 6)

%	
83	Using visual aids
83	Developing training contacts (externally)
83	Selling training to management
83	Keeping up-to-date with training literature
66	Working with other service functions
66	Administration of training
66	Travelling between sites
66	Telephoning
66	Recruiting and selecting trainees
66	Liaising with educational organisation
66	Using case studies
66	Formal presentation to management
66	Developing training contacts (internally)
66	Working with TUs
66	Working with management
50	Administering courses (internal)
50	Preparing training programmes
50	Assisting in the identification of training needs
50	Writing training objectives
50	Job training analyses

BOTTOM 10

16	Training instructors
16	Using interactive techniques
16	Maximising grants
16	Supervising trainees
16	Assessing future manpower requirements
0	Assisting in the development of organisational change
0	Applying OD techniques
0	Applying PI techniques
0	Using simulators
0	Psychological testing

TABLE 30

ROLES COVERED IN THE LAST 3 YEARS: TOP 20 (SIZE: 2000+)

(n = 14)

%	
71	Selling training to management
63	Working with management
63	Assisting in the identification of training needs
63	Administration of training
56	Getting training equipment
56	Instructing
50	Preparing training programmes
50	Developing training contacts (internally)
50	Keeping up-to-date with training literature
50	Writing training reports
50	Administering courses (internal)
50	Travelling between sites
42	Using visual aids
42	Evaluating training
42	Developing training contacts (externally)
42	Using case studies
42	Supervising training staff
42	Counselling
42	Recruiting and selecting trainees
42	Telephoning

BOTTOM 10

14	Placing trainees
14	Job training analyses
14	Working with TUs
14	Assessing the performance of trainees
14	Training instructors
7	Applying OD techniques
7	Using simulators
7	Writing progress reports on trainees
7	Applying PI techniques
0	Membership of training committees (externally)

TABLE 31

SPEARMAN CORRELATIONS FOR TO ROLES AND KEY AREAS

ROLES	Variable Pair	Coefficient
	All firms (1 year) : firms 100- 299 (1 year)	0.7550
	All firms (1 year) : firms 300- 599 (1 year)	0.7162
	All firms (1 year) : firms 600- 999 (1 year)	0.8275
	All firms (1 year) : firms 1000-1499 (1 year)	0.7723
	All firms (1 year) : firms 1500-1999 (1 year)	0.6936
	All firms (1 year) : firms 2000+ (1 year)	0.7996
	All firms: change over 3-year period	0.9121
	All firms (3 years) : firms 100- 299 (3 years)	0.6649
	All firms (3 years) : firms 300- 599 (3 years)	0.6727
	All firms (3 years) : firms 600- 999 (3 years)	0.7352
	All firms (3 years) : firms 1000-1499 (3 years)	0.8504
	All firms (3 years) : firms 1500-1999 (3 years)	0.7849
	All firms (3 years) : firms 2000+ (3 years)	0.7914
KEY AREAS		
	All firms : firms 100- 299	0.7028
	All firms : firms 300- 599	0.6470
	All firms : firms 600- 999	0.7925
	All firms : firms 1000-1499	0.6609
	All firms : firms 1500-1999	0.5857
	All firms : firms 2000+	0.6706

TABLE 32

DIFFICULT ROLES

ALL FIRMS TOP 20 (n = 58)

%	
38	Selling training to management
34	Assisting in the development of organisational change
21	Evaluating training
19	Measuring job performance
17	Counselling
16	Increasing training budget
16	Getting training equipment
16	Assessing future manpower requirements
14	Keeping up-to-date with training literature
14	Costing training
14	Assisting in the identification of training needs
12	Identifying training needs
12	Writing training objectives
12	Structuring training budgets
12	Using training budgets
12	Preparing training programmes
12	Working with TUs
12	Preparing training manuals
10	Working with management
9	Formal presentation to management

BOTTOM 10

2	Using other tests
2	Liaising with educational organisation
2	Administering courses (external)
2	Applying PI techniques
2	Membership of training committees (externally)
0	Supervising trainees
0	Administering courses (internal)
0	Using simulators
0	Telephoning
0	Using visual aids

TABLE 33

TIME-CONSUMING ROLES

ALL FIRMS TOP 20 (n = 58)

%	
47	Preparing training programmes
43	Administration of training
40	Identifying training needs
36	Recruiting and selecting trainees
35	Travelling between sites
31	Keeping up-to-date with training literature
31	Assisting in the identification of training needs
29	Assisting in the development of organisational change
28	Selling training to management
28	Administering courses (internal)
24	Working with management
24	Preparing training manuals
22	Making grant claims
21	Telephoning
21	Measuring job performance
21	Assessing future manpower requirements
17	Writing training objectives
17	Liaising with training board staff
16	Formal presentation to management
16	Using training budgets

BOTTOM 10

3	Getting training staff
3	Placing trainees
3	Using interactive techniques
3	Working with other service functions
3	Using case studies
3	Recruiting and selecting instructors
2	Applying PI techniques
0	Using simulators
0	Getting training accommodation
0	Using visual aids

TABLE 34

KEY AREAS

ALL FIRMS TOP 20 (n = 58)

%	
64	Working with management
57	Identifying training needs
53	Selling training to management
47	Preparing training programmes
45	Administration of training
34	Assisting in the development of organisational change
34	Recruiting and selecting trainees
33	Assisting in the identification of training needs
29	Liaising with educational organisation
29	Formal presentation to management
29	Developing training contacts (internally)
28	Administering courses (internal)
26	Making grant claims
24	Developing training contacts (externally)
24	Liaising with training board staff
22	Working with TUs
22	Formal lecturing
22	Writing training policy
21	Counselling
21	Assessing future manpower requirements

BOTTOM 10

5	Getting training staff
5	Membership of training committees (externally)
3	Getting training accommodation
3	Using visual aids
3	Telephoning
3	Placing trainees
3	Increasing training budget
2	Training instructors
2	Applying PI techniques
0	Using simulators

TABLE 35

KEY AREAS

FIRMS: 100-299 TOP 20 (n = 8)

%	
87	Working with management
62	Identifying training needs
62	Administration of training
62	Liaising with training board staff
62	Assisting in the development of organisational change
50	Selling training to management
50	Assessing future manpower requirements
50	Measuring job performance
50	Preparing training programmes
50	Structuring training budgets
50	Recruiting and selecting trainees
38	Making grant claims
38	Developing training contacts (externally)
38	Working with TUs
38	Liaising with educational organisation
38	Assisting in the identification of training needs
38	Working with other service functions
38	Counselling
38	Structuring training records
38	Costing training

BOTTOM 10

0	Getting training equipment
0	Getting training accommodation
0	Training instructors
0	Applying PI techniques
0	Recruiting and selecting instructors
0	Using simulators
0	Applying OD techniques
0	Getting training staff
0	Supervising training staff
0	Psychological testing

TABLE 36

KEY AREAS

FIRMS: 300-599 TOP 20 (n = 9)

%	
55	Recruiting and selecting trainees
44	Administration of training
44	Liaising with educational organisation
44	Working with management
44	Assisting in the identification of training needs
33	Assessing future manpower requirements
33	Working with TUs
33	Identifying training needs
33	Formal presentation to management
33	Preparing training programmes
33	Selling training to management
22	Travelling between sites
22	Developing training contacts (externally)
22	Working with other service functions
22	Writing training policy
22	Making grant claims
22	Developing training contacts (internally)
22	Using other tests
22	Assessing performance of trainees
11	Assisting in writing of training policy

BOTTOM 10

0	Maximising grants
0	Measuring job performance
0	Keeping up-to-date with training literature
0	Training instructors
0	Supervising trainees
0	Membership of training committees (internally)
0	Placing trainees
0	Using simulators
0	Applying OD techniques
0	Using interactive techniques

TABLE 37

KEY AREAS

FIRMS: 600-999 TOP 20 (n = 9)

%	
81	Working with management
72	Identifying training needs
54	Recruiting and selecting trainees
54	Liaising with educational organisation
54	Writing training policy
45	Assisting in the identification of training needs
45	Selling training to management
36	Developing training contacts (internally)
36	Preparing training programmes
36	Assisting in the development of organisational change
27	" " " writing of training policy
27	Evaluating training
27	Instructing
27	Administering courses (internal)
27	Administration of training
27	Assessing performance of trainees
27	Counselling
18	Maximising grants
18	Keeping up-to-date with training literature
18	Applying OD techniques

BOTTOM 10

0	Telephoning
0	Travelling between sites
0	Membership of training committees (internally)
0	Using training budgets
0	Writing training reports
0	Placing trainees
0	Using visual aids
0	Getting training equipment
0	Using case studies
0	Using simulators

TABLE 38

KEY AREAS

FIRMS: 1000-1499 TOP 20 (n = 10)

%	
70	Identifying training needs
70	Administration of training
60	Preparing training programmes
60	Administering courses (internal)
60	Selling training to management
50	Liaising with training board staff
50	Working with management
40	Making grant claims
40	Administering courses (external)
40	Formal lecturing
30	Working with other service functions
30	Developing training contacts (externally)
30	Liaising with educational organisation
30	Measuring job performance
20	Membership of training committees (internally)
20	Evaluating training
20	Developing training contacts (internally)
20	Counselling
10	Preparing training manuals
10	Structuring training records

BOTTOM 10

0	Applying OD techniques
0	Increasing training budget
0	Applying PI techniques
0	Using other tests
0	Recruiting and selecting trainees
0	Using interactive techniques
0	Liaising with Y.E.O.
0	Using simulators
0	Handling complaints
0	Psychological testing

TABLE 39

KEY AREAS

FIRMS: 1500-1999 TOP 20 (n = 6)

%	
83	Working with management
66	Identifying training needs
66	Selling training to management
66	Preparing training programmes
50	Working with TUs
50	Developing training contacts (externally)
50	Formal presentation to management
33	Administering courses (internal)
33	Administration of training
33	Assisting in the development of organisational change
33	Keeping up-to-date with training literature
33	Using interactive techniques
33	Counselling
33	Using training budgets
33	Liaising with training board staff
33	Assisting in the identification of training needs
16	Telephoning
16	Liaising with Y.E.O.
16	Writing training objectives
16	Job training analyses

BOTTOM 10

0	Training instructors
0	Membership of training committees (externally)
0	Getting training accommodation
0	Supervising trainees
0	Assessing future manpower requirements
0	Administering courses (external)
0	Writing training policy
0	Applying PI techniques
0	Using simulators
0	Psychological testing

TABLE 40

KEY AREAS

Firms: 2000+ TOP 20 (n = 14)

%	
63	Selling training to management
50	Assisting in the development of organisational change
42	Identifying training needs
42	Developing training contacts (internally)
42	Preparing training programmes
40	Structuring training budgets
35	Instructing
35	Administration of training
35	Writing training objectives
35	Formal lecturing
28	Supervising training staff
28	Assisting in the identification of training needs
28	Recruiting and selecting trainees
28	Administering courses (internal)
21	Writing training policy
21	Making grant claims
14	Writing progress reports on trainees
14	Using training budgets
14	Using interactive techniques
14	Writing training reports

BOTTOM 10

0	Placing trainees
0	Job training analyses
0	Liaising with Y.E.O.
0	Structuring training records
0	Training instructors
0	Liaising with educational organisation
0	Using simulators
0	Keeping up-to-date with training literature
0	Applying PI techniques
0	Membership of training committees (externally)

TABLE 41

COMPARISON OF RANKINGS: KEY AREAS, RANKED ROLES, DIFFICULT ROLES, TIME-CONSUMING ROLES

Key Areas	K	R	DR	TC
Working with management	1	1	19	11
Identifying training needs	2	7	16	3
Selling training to management	3	5	1	9
Preparing training programmes	4	6	16	1
Administration of training	5	2	-	2
Assisting in the development of organisational change	6	16	2	8
Recruiting and selecting trainees	7	15	-	4
Assisting in the identification of training needs	8	10	11	7
Liaising with educational organisations	9	12	-	-
Formal presentation to management	10	-	20	19
Developing training contacts (internally)	11	8	-	-
Administering courses (internal)	12	9	-	-
Making grant claims	13	-	-	13
Developing training contacts (externally)	14	4	-	-
Liaising with training board staff	15	13	-	18
Working with TUs	16	-	17	-
Formal lecturing	17	17	-	-
Writing training policy	18	18	-	-
Counselling	19	19	5	-
Assessing future manpower requirements	20	-	-	10

Key: K --- Key Area
R --- Roles
DR --- Difficult Roles
TC --- Time-consuming Roles

TABLE 42

ENGINEERING RESPONDENTS: TOP 20 ROLES

(n = 8)

%	
100	Identifying Training Needs
100	Recruiting and Selecting Trainees
100	Working with Management
100	Liaising with Educational Organisations
100	Telephoning
100	Handling Disciplinary Problems
87	Developing Training Contacts (externally)
87	Administration of Training
87	Writing Training Objectives
87	Preparing Training Programmes
87	Administering Courses (internal)
87	Liaising with Training Board Staff
75	Writing Training Policy
75	Selling Training to Management
75	Using Other Tests
75	Formal Presentation to Management
75	Developing Training Contacts (internally)
75	Working with TUs
75	Formal Lecturing
75	Increasing Training Budgets

TABLE 43

A LIST OF THE ROLES WHICH T.O.s STATE THEY ARE NOT PERFORMING BUT FEEL THEY SHOULD BE PERFORMING

The following roles were mentioned (the number in the bracket relates to the number of times)

Administering and controlling training	(5)
Assessing and planning future training requirements	(2)
Budgets: structure and use	(2)
Developing contacts and liaison (internal and external)	(1)
Enabling/Internal consultant	(3)
Evaluation and validation	(4)
Human asset accounting	(1)
Interactive skills	(1)
Job training analysis (including the writing of job descriptions)	(4)
Management and supervisory training	(1)
Manpower planning	(2)
Programme instruction: application	(1)
Sales training	(1)
Updating training methods	(2)
Recruitment and selection, including instructors	(4)
Supervision of training staff	(1)

More than half of the sample (56%) did not add further roles to those they were currently performing.

TABLE 44

T.O.s' AREAS OF GREATEST IMPACT

(n = 51)

Acceptability to Management	(6)
Acceptability to T.U.s	(2)
Administration of Training (including structuring)	(2)
Career Counselling	(1)
Clerical Training	(1)
Coordination with F.E. Colleges	(2)
Craft Training	(6)
Design and Development Training	(1)
Instructor Training	(1)
Management Training (including Senior Management)	(16)
Operative Training	(3)
O.D. Consultant	(1)
Production Managers (training for)	(3)
Recruitment Activities	(2)
Resources Increased	(1)
Safety Training	(3)
Sales Training	(3)
Selection of Employees	(1)
Supervisory Training	(7)
Team Building (management level)	(2)
Technician and Technologist Training	(4)
Training Costs decreased	(3)

TABLE 45

CAREER ASPIRATIONS IN 3 YEARS' TIME ANALYSED BY AGE

(n = 57)

%

Career Choice	Under 30 yrs	30-40	41-50	51+	Total
Present Job		3	3	14	20
Extended Training Function	2	9	7		18
Personnel Management	9	5	9		23
Line Management		11	3		14
Retired				3	3
Redundancy			2		2
Don't Know	2	4	11	3	20
Total	13	32	35	20	100

TABLE 46

CATEGORIES OF TRAINEES: CHANGES OVER THREE-YEAR PERIOD

(n = 58)

Categories	(%) 3 years	1 year
Directors	17	28
Senior Managers	41	59
Managers	62	76
Supervisors	77	83
Sales/Marketing	32	41
Commercials	43	48
Clerical	60	70
Graduate/Prof.	39	41
Technician	50	58
Craft/Operator	60	62
Others	26	28

TABLE 47

TYPES OF TRAINING ANALYSIS USED (ALL FIRMS)

Type of Analysis* (%)

Categories	1	2	3	4	5	6
Director	-	14	-	-	9	5
Senior Manager	-	20	-	3	17	25
Manager	-	24	-	-	12	29
Supervisor	5	26	-	10	5	31
Sales/Marketing	-	15	-	9	2	7
Commercial	3	24	-	3	2	10
Clerical	9	28	-	14	-	15
Graduate/Professional	2	12	-	9	3	12
Technician	7	14	-	17	-	14
Craft/Operator	14	7	-	19	-	17
Others	9	5	-	7	-	7

*Key: 1. TWI
2. Job Description
3. Seymour-type
4. Task analysis
5. Problem-centred analysis
6. Other

TABLE 48

Types of Analysis Used

Firm size: 100-299 (n = 8)

Categories	1	2	3	4	5	6	7
Directors		12			25	13	50
Senior Managers		12			25	13	50
Managers		25				38	37
Supervisors		38				30	12
Sales/Marketing		13		12			75
Commercial		25		13			63
Clerical		25		38		12	25
Graduate/Professional		13		25			63
Technician		25		38		12	25
Craft/Operator		13		50		12	25

(%)

Key:
1. TWI
2. Job Description
3. Seymour-type
4. Task analysis
5. Problem-centred
6. Other
7. No response

TABLE 49

Types of Analysis Used

Firm size: 300-599 (n = 9)

Categories	1	2	3	4	5	6	7
Directors		22					80
Senior Managers		33		11			56
Managers		45		11		11	33
Supervisors	22	34		22		11	11
Sales/Marketing		45		11			44
Commercial	11	33				11	45
Clerical	11	45		22			22
Graduate/Professional		11					89
Technician	11	11		22			56
Craft/Operator	22	22		11			45

(%)

Key:
1. TWI
2. Job Description
3. Seymour-type
4. Task analysis
5. Problem-centred
6. Other
7. No response

TABLE 50

Types of Analysis Used

Firm size: 600-999 (n = 9)

Categories	1	2	3	4	5	6	7
Directors		18			18	18	46
Senior Managers		18		9	27	37	9
Managers		27		18	18	28	9
Supervisors		18		18	9	46	9
Sales/Marketing		18		9	9	9	55
Commercial	9	37			9	18	27
Clerical	27	37		9		18	9
Graduate/Professional	9	9				9	73
Technician	18	28				27	27
Craft/Operator	27	9		9		27	28

(%)

Key:
1. TWI
2. Job Description
3. Seymour-type
4. Task analysis
5. Problem-centred
6. Other
&. No response

TABLE 51

Types of Analysis Used

Firm size: 1000-1499 (n = 10)

Categories	1	2	3	4	5	6	7
Directors		10					90
Senior Managers		10				10	80
Managers		10				60	30
Supervisors		20		10		50	20
Sales/Marketing		10				10	80
Commercial		20				20	60
Clerical	10	20				30	40
Graduate/Professional		10		10		20	60
Technician		10		20		20	50
Craft/Operator	10			20		40	30

(%)

Key:
1. TWI
2. Job Description
3. Seymour-type
4. Task analysis
5. Problem-centred
6. Other
7. No response

TABLE 52

Types of Analysis Used

Firm size: 1500-1999 (n = 6)

Categories	1	2	3	4	5	6	7
Directors		18					83
Senior Managers		33			17	33	17
Managers		33			17	33	17
Supervisors		33			17	33	17
Sales/Marketing		17		17			66
Commercial		18		17			66
Clerical		17		33		17	33
Graduate/Professional		17		17		6	50
Technician		17		33			50
Craft/Operator		17		33		17	33

(%)

Key:
1. TWI
2. Job Description
3. Seymour-type
4. Task analysis
5. Problem-centred
6. Other
7. No response

TABLE 53

Types of Analysis Used

Firm size: 2000+ (n = 14)

Categories	1	2	3	4	5	6	7
Directors		7			7		86
Senior Managers		21			29		50
Managers		14		7	29	14	36
Supervisors	7	22		7	7	7	50
Sales/Marketing				7		14	79
Commercial		14				7	79
Clerical		21				15	64
Graduate/Professional		14		7	14	22	43
Technician	7			7		14	72
Craft/Operator	7			7		7	79

(%)

Key:
1. TWI
2. Job Description
3. Seymour-type
4. Task analysis
5. Problem-centred
6. Other
7. No response

TABLE 54

. ADMINISTRATION AND TRAINING CATEGORIES

(%)

Categories	Administration	Training
Directors	24	12
Senior Managers	52	34
Managers	72	57
Supervisors	79	71
Sales/Marketing	36	21
Commercial	45	26
Clerical	62	43
Graduate/Professional	45	33
Technician	53	34
Craft/Operator	62	43
Others	22	16

TABLE 55

TYPES OF EVALUATION USED BY T.O.s (%)

Changes over three-year period

Types of Evaluation

Categories	1	2	3	4	5	6	7	8
Director	9(5)	--	---	5(5)	--	5(5)	2(2)	5(3)
Senior Manager	14(14)	--	--	10(9)	--	9(7)	4(3)	17(12)
Manager	5(17)	(2)	--	19(9)	--	10(9)	5(5)	24(19)
Supervisor	9(16)	3 -	- (2)	16(7)	3(5)	14(10)	10(14)	17(14)
Sales/Marketing	11(3)	5 -	- (2)	21(3)	--	21(5)	16(9)	26(7)
Commercial	5(9)	-(2)	--	10(5)	2 -	7(7)	5(5)	12(10)
Clerical	5(10)	3(3)	--	5(5)	2 -	22(14)	5(9)	16(12)
Graduate/Professional	7(9)	2 -	--	5(5)	--	12(9)	3(2)	9(9)
Technician	2(3)	7(2)	--	2(3)	--	31(26)	3(3)	7(3)
Craft/Operator	3(3)	7(5)	2(2)	2(2)	--	30(22)	5(5)	9(9)
Others	--	3(2)	--	--	--	14(10)	3(5)	5(5)

Key:
1. Management acceptance of training
2. Pre and post tests
3. Cost/benefit analyses
4. Formal appraisal scheme
5. Number of courses run
6. Against pre-set training objective
7. Not evaluated
8. Others (please specify)

(Number in brackets denotes % of users in the three-year period)

TABLE 56

FACTORS USED TO DETERMINE TRAINING NEEDS (%)

(n = 58)

Determinants	Now	3 years ago
Derived from corporate objectives	40	29
By-product of appraisal scheme	69	45
Board or senior management decision	38	45
Based on future capital expenditure	31	24
Specific demands by managers	78	69
Training board requirements	40	38
Joint manager/TO decision	72	48
Safety training requirements	74	45
Legislative requirement	69	40
Problem areas in organisation	57	41
TO's decision	47	29
Derived from OD analysis	12	7

TABLE 57

TRAINING TECHNIQUES USED (%)

(n = 58)

Techniques	Now	3 years ago
Case Studies	55	52
Simulators	7	5
Role Play	45	38
Lectures	83	76
Informal instruction	66	60
Buzz groups	5	2
Seminars	72	60
Training projects	55	38
Discussion groups	64	43
Interactive techniques	33	17

TABLE 58

BUDGET DETERMINANTS (n = 58)

Determinants	%
Structured by TO and agreed by management	62
Jointly assessed with management	26
Presented to you without prior consultation	10
Finance supplied as required	18
Sub-divided according to category of trainee	3
Determined by Training Board requirements	0
Sub-division of personnel budget	22
Derived from training need analysis	36

TABLE 59

(n = 46)

RELATIONSHIPS WITH TRAINING BOARD STAFF (%)

	Cooperative	Apathetic	Hostile
Training Officer and Training Board Staff	98	0	2
Management and Training Board Staff	74	13	13

EXTENT OF GRANT ORIENTATION (n = 46)

	Very	Marginally	Not
Extent of orientation to grant maximisation	24	43	33

TABLE 60

ORGANISATIONS USING OD (n = 55)

(%)

Firm grouping	Users	Non-users
100- 299	2	11
300- 599	5	11
600- 999	7	13
1000-1499	4	15
1500-1999	4	5
2000+	14	9
Total	36	64

TABLE 61

FULFILMENT AND RELEVANCE OF TTO COURSE OBJECTIVES

Course Objectives	Fulfilled	Unfulfilled	Relevant	Irrelevant
recognise the importance of the acceptance factor in the trainer's job	50	3	51	3
state the characteristics of systematic training	43	7	45	6
distinguish the types of training functions in organisations	38	12	31	19
identify motivational needs and relate those needs to differing styles of organisational structure	36	15	39	10
carry out an assessment of training needs and write an assessment report	43	8	46	6
undertake a training analysis	43	8	44	7
structure, job description and specification	42	8	47	4
identify training needs of individuals	43	8	46	7
prepare a training programme	45	8	49	5
structure a recording procedure	38	12	39	10
state the main characteristics of instructional techniques	37	11	41	8
select appropriate visual aids for instructional sessions	42	9	45	7
establish validation and evaluation criteria, with particular reference to the problems of applying cost-benefit criteria	26	25	33	16
carry out assessment interview of staff with a view to their more effective deployment and development	35	18	36	17

TABLE 62

POST TTO (INTRODUCTORY) COURSE TRAINING: TOP 20 SUBJECTS

(%)	SUBJECT
50	Safety
47	Employee Legislation
40	Industrial Relations
38	Management Training
38	Interviewing
34	Appraisal
31	Training Board Requirements
29	Visits to other Training Establishments
26	Inter-active Skills
24	Problem Solving
24	Motivation
24	Instructor Training
22	Manpower Planning
22	Business Management
22	Counselling
21	Training Budgets
19	Assessment of Training Needs
19	Handling Conflict
19	Visual Aids
17	Training Aids

FUTURE TRAINING REQUIREMENTS: TOP 10

24	Industrial Relations
22	Management Training
21	Employee Legislation
17	Counselling
14	Handling Conflict
14	Manpower Planning
14	Planned Work Experience
14	Visits to other Training Establishments
10	Personal Tutoring
10	Motivation
9	OD
9	Career Guidance

APPENDIX (v)

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